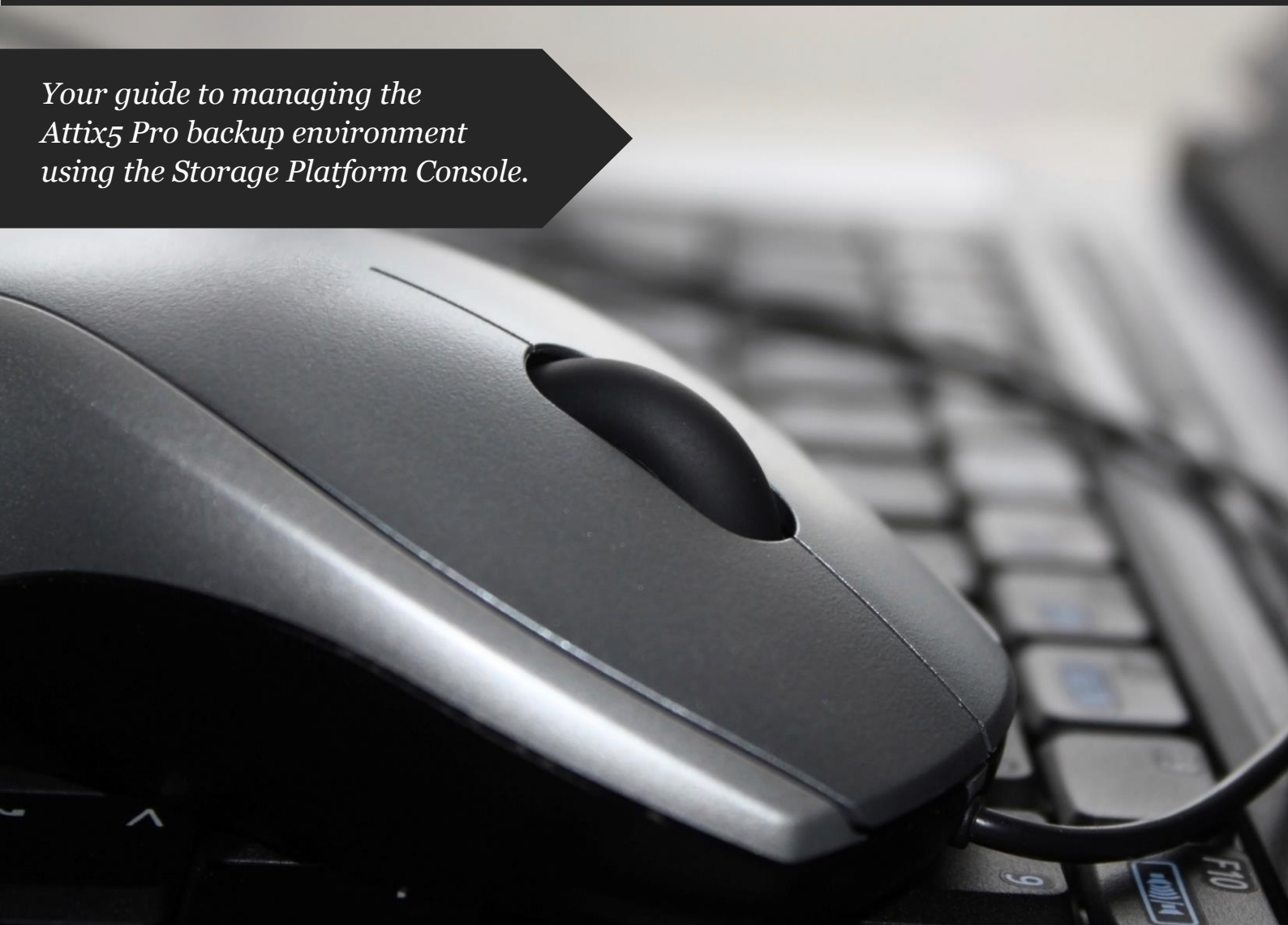
ATTIX5

Attix5 Pro
Storage Platform Console

V7.0.2 User Manual

for Microsoft Windows

Your guide to managing the Attix5 Pro backup environment using the Storage Platform Console.



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Instruction symbols

The following icons are used in this User Manual:

The information icon precedes important information.

The example icon indicates a practical illustration of a process or procedure.

The hint icon indicates a suggestion or hint to guide or assist you with performing a task.

The warning icon provides a warning against potential mistakes and actions that could cause critical error.

ATTIX5

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Chapter 1: Introduction

Congratulations on choosing the Attix5 Pro Storage Platform. Attix5 Pro minimises risk, maximises productivity and allows businesses to regain control of their most valuable asset - their data.

For technical support, please contact your software provider.

Product overview

The Attix5 Pro Storage Platform Console is a management tool that enables you to manage the Storage Platform and all the elements within the larger backup environment. The Attix5 Pro storage solution, the Storage Platform and the Storage Platform Console are explained in more detail below.

Storage solution

Within an Attix5 Pro storage solution setup, Backup Clients (Desktop & Laptop [DL] and/or Server Edition [SE]) connect and back up data to the Storage Platform.

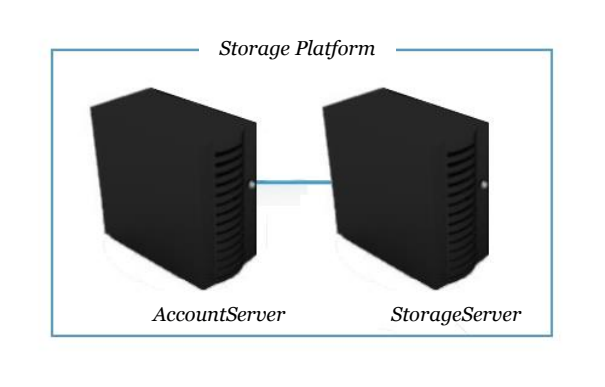
The following diagram illustrates a common scenario:

Files and folders stored on one or more machines running SE or DL can be backed up to a Storage Platform over an Internet connection or within a Local Area Network.

In the event of data loss or corruption on the server, data can be retrieved from the Storage Platform and restored to the original or another Client in just a few easy steps.

Storage Platform

An Attix5 Pro Storage Platform (SP) consists of an AccountServer (AS) connected to one or more StorageServer[s] (SS). The AccountServer handles user authentication and Backup Group management. The StorageServer is the file storage location for Clients' encrypted data.



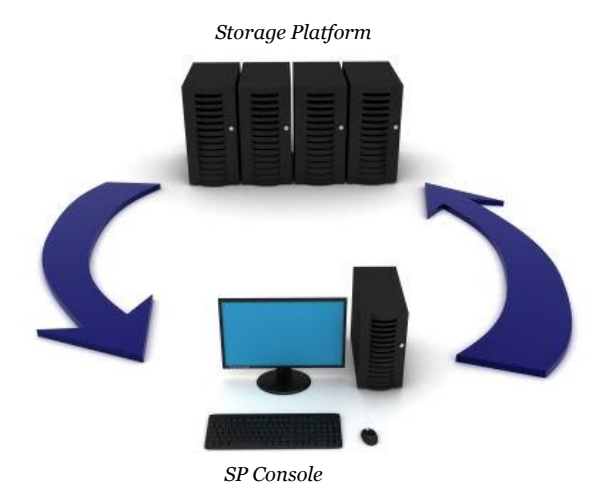
The diagram on the left represents a common scenario:

When an AccountServer is connected to one or more StorageServer(s), together they function as a Storage Platform.

Note: *These components (AS & SS) may run on the same or separate physical platforms.*

Storage Platform Console

The Attix5 Pro Storage Platform Console is used to manage and administer all the elements within the storage solution.



The diagram on the left represents a simplified scenario:

The SP Console connects to the Storage Platform and enables the management of the entire backup environment (Backup Accounts, Backup Clients and the Storage Platform).

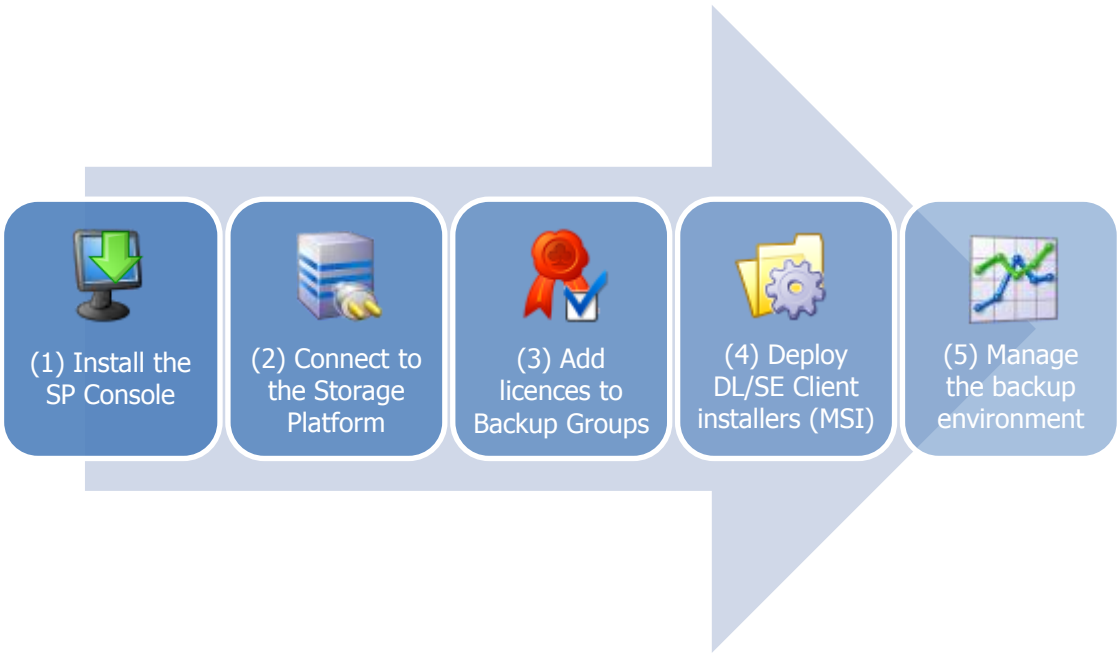
Chapter 2: Getting started

This chapter is a Quick Guide to getting the Attix5 Pro Storage Platform Console up and running.

> ***Note:*** *For more detailed information on using the SP Console, see Chapters 3 to 8 later in this manual.*

How to set up an SP Console

Follow the steps outlined below to set up the SP Console to access and control the Storage Platform and Backup Accounts (i.e. the backup environment):


(1) Install the SP Console
(2) Connect to the Storage Platform
(3) Add licences to Backup Groups
(4) Deploy DL/SE Client installers (MSI)
(5) Manage the backup environment

2

Step 1: Install the SP Console

To install the SP Console on a Windows operating system:

1. Ensure that the machine on which you wish to install the Console meets the minimum system requirements listed in Chapter 3, “Installation”.
2. Run the Console installer issued to you by your software provider.
3. Follow the Setup Wizard steps.

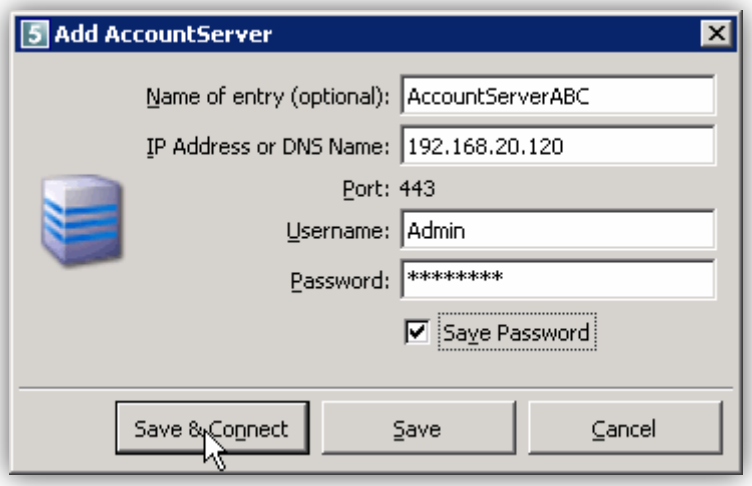
> ***Note:*** *For detailed information on each of the wizard steps, see* The Setup Wizard *in Chapter 3, “Installation”.*

After completing the wizard, the SP Console will be installed. The next step is to connect to the Storage Platform.

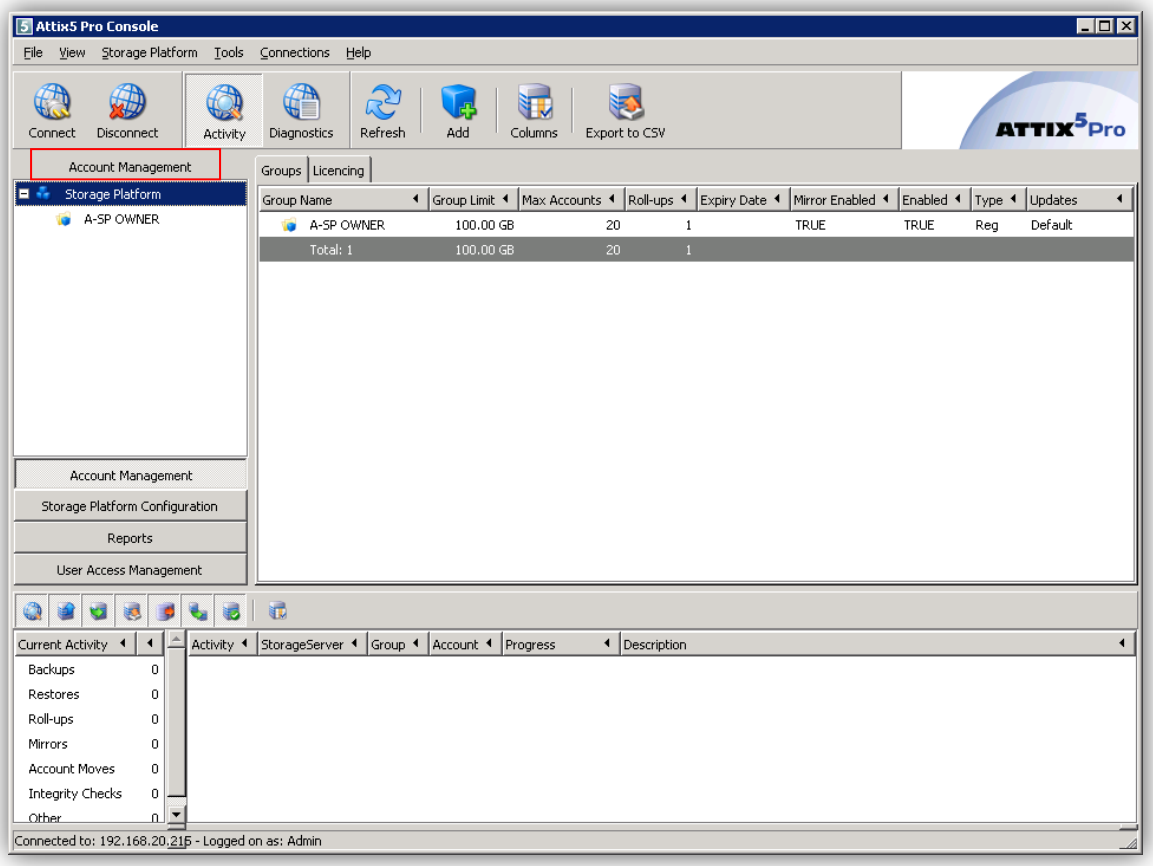
Step 2: Connect to the Storage Platform

To connect to a Storage Platform for the first time:

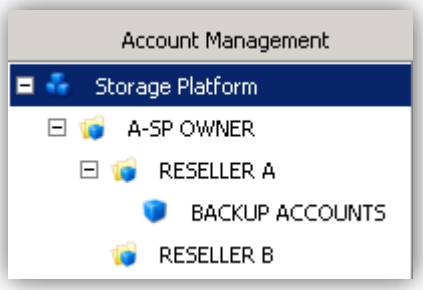
1. In the **Add AccountServer** dialog box that appears when you open the SP Console for the first time, enter the details of the AccountServer you wish to connect to in the boxes provided.
2. Click **Save and Connect**.



Once connected, the SP Console opens in Account Management view by default.


Attix5 Pro Console
File View Storage Platform Tools Connections Help
Connect Disconnect Activity Diagnostics Refresh Add Columns Export to CSV
ATTIX5 Pro
Account Management
Storage Platform
A-SP OWNER
Groups Licencing
Group Name Group Limit Max Accounts Roll-ups Expiry Date Mirror Enabled Enabled Type Updates
A-SP OWNER 100.00 GB 20 1 TRUE TRUE Reg Default
Total: 1 100.00 GB 20 1
Account Management
Storage Platform Configuration
Reports
User Access Management
Current Activity
Backups 0
Restores 0
Roll-ups 0
Mirrors 0
Account Moves 0
Integrity Checks 0
Other 0
Activity StorageServer Group Account Progress Description
Connected to: 192.168.20.215 - Logged on as: Admin

If there are any Collections or Backup Groups already created on the AccountServer, they will display in the Account Management tree, under the ***Storage Platform*** *node.*



An SP Console user with the correct permissions can configure the Storage Platform, create and configure Collections and Backup Groups and manage any Backup Accounts that already exist on the Storage Platform.

> ***Note:*** *The configuration options available depend on your user access rights. As an Admin user, you have full access rights. For a detailed description of the rights available, see Chapter 9, "User Access Management".*

As every Backup Account needs to belong to a Backup Group, you need to add at least one Backup Group to the SP Console. For more information, see *Adding and deleting Groups* in Chapter 6, "Account Management".

Once you have added a Backup Group, you need to add the appropriate licences to allow users to add new Backup Accounts to it.

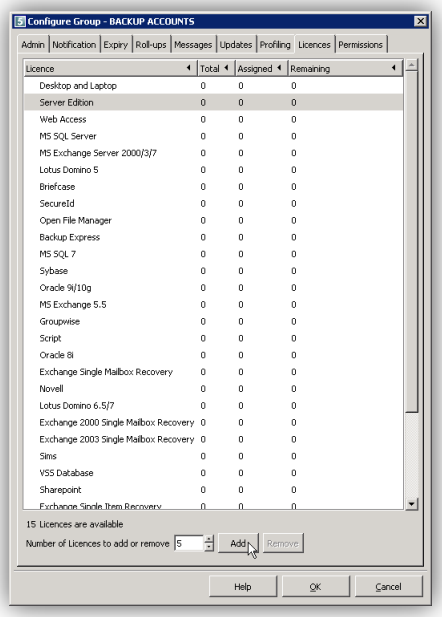
> ***Note:*** *New Backup Accounts are created via the Account Wizard that runs immediately after a Backup Client installation is complete. For more information, please refer to the relevant Backup Client User Manual (Desktop & Laptop or Server Edition).*

Step 3: Add licences to Backup Groups

Before Backup Accounts can be created on the Storage Platform, appropriate licences need to be added to the relevant Backup Group. These must be added from the pool of purchased licences available.

> ***Note:*** *To purchase additional licences, please contact your software provider.*

To add licences to a Backup Group:

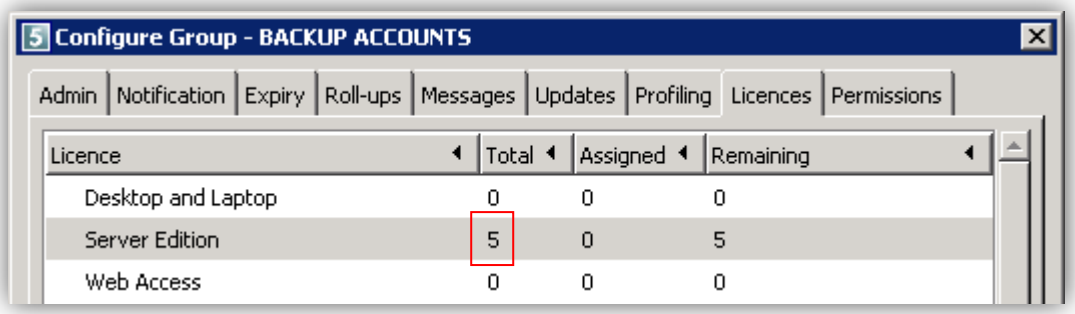


1. In the Account Management view, expand the **Storage Platform** node in the Account Management tree.
2. Double-click the Backup Group name. Alternatively, right-click the name, and then click **Configure**.
3. In the **Configure Group** dialog box that appears, click the **Licences** tab.
4. Select the type of licence to add to the Backup Group. E.g. **Server Edition**.
5. In the **Number of Licences to add or remove** box, type the number of licences to add.
6. Click the **Add** button.

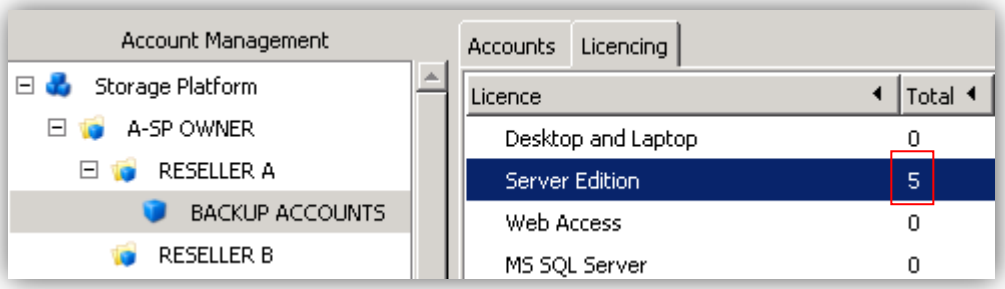
   > ***Tip:*** *If the **Add** button is disabled, ensure that the Backup Collection to which the Group belongs has sufficient licences assigned to it.*

7. Click **OK**.

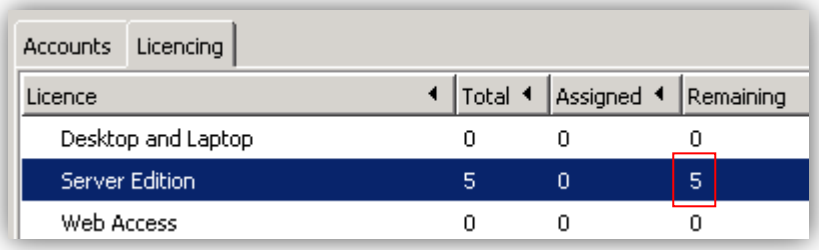
The number of licences added to the Backup Group will display in the ***Total*** *column on the* ***Licences*** *tab in the* ***Configure Group*** *dialog box.*



The number of licences will also display in the ***Total*** *column on the* ***Licencing*** *tab in the Account Management view.*



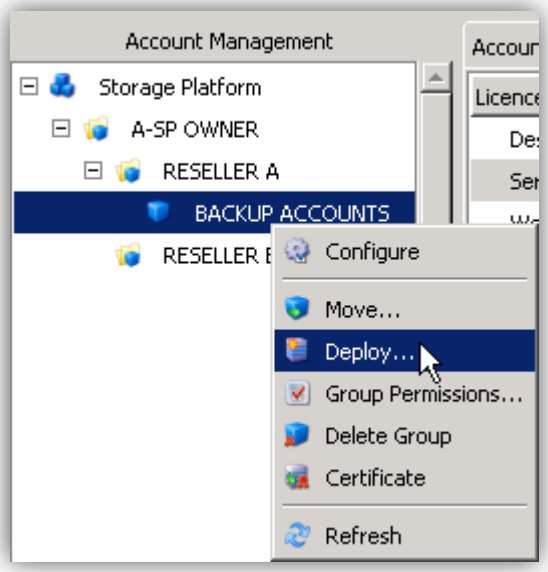
Now that licences have been added to the Backup Group, a deployment MSI (installer) file can be created from that Backup Group and used to install Backup Clients onto desktop, laptop or server machines. Those installations will enable users to create new Backup Accounts that belong to the Backup Group from which the MSI was deployed. For each Backup Account created, one licence is assigned and the number of remaining licences available for use displays in the **Remaining** column.

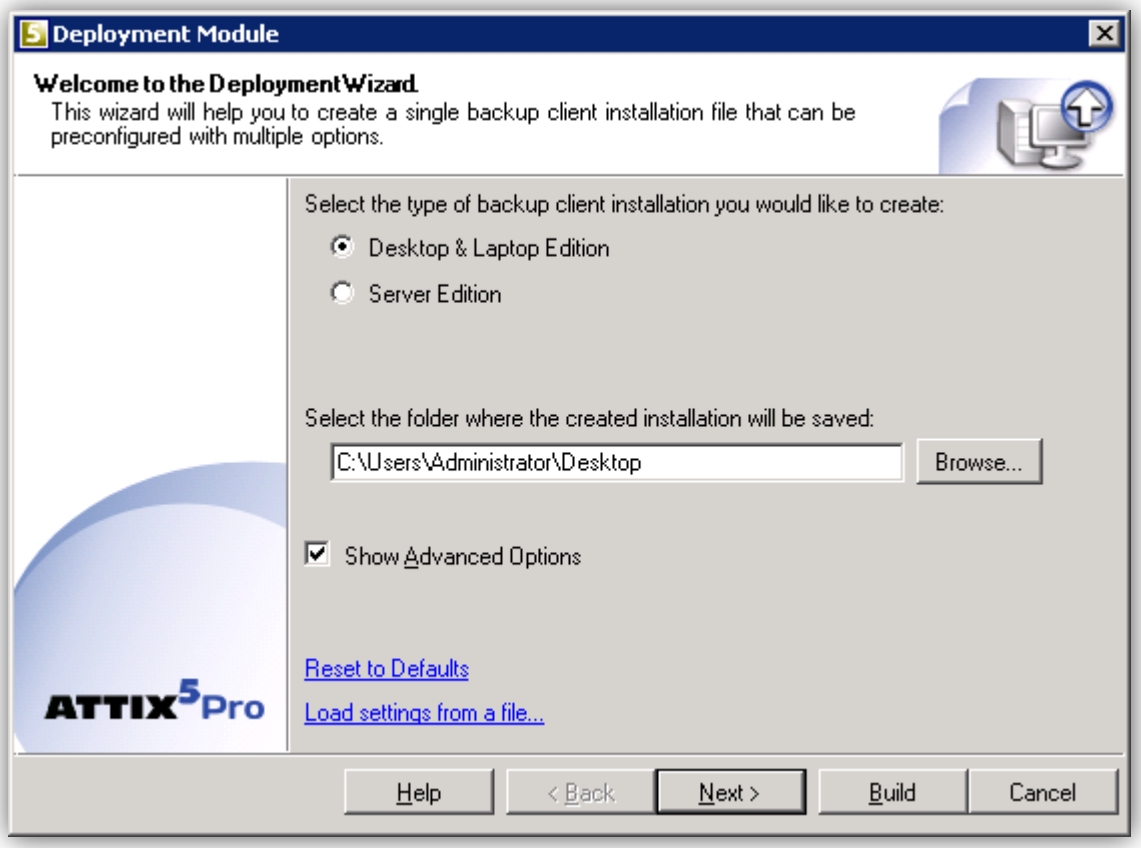


Step 4: Deploy an MSI (installer) file

To deploy an MSI file:

1. In the Account Management view, expand the **Storage Platform** node in the Account Management tree.
2. Right-click the name of the Backup Group to which the new user(s) should belong and then click **Deploy**. The Deployment Wizard will launch.
3. Select the type of Backup Client installation to create, select the folder in which to save the installation, click **Next** and then complete the Deployment Wizard.



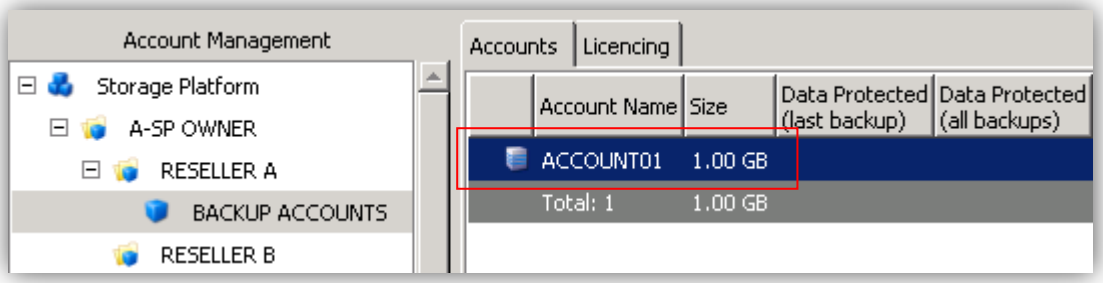

Deployment Module
Welcome to the Deployment Wizard
This wizard will help you to create a single backup client installation file that can be preconfigured with multiple options.
Select the type of backup client installation you would like to create:
Desktop & Laptop Edition
Server Edition
Select the folder where the created installation will be saved:
C:\Users\Administrator\Desktop
Browse...
Show Advanced Options
Reset to Defaults
Load settings from a file...
ATTIX5 Pro
Help
< Back
Next >
Build
Cancel

For more information, see *Deployment Wizard* in Chapter 6, "Account Management".

After completing the Deployment Wizard, an MSI file will be created. This file can be used to install the Attix5 Pro Client application, create a Backup Account and initiate the first backup.

Note: For more information on installing the Backup Client application and creating Backup Accounts, please refer to the relevant User Guide (Attix5 Pro Desktop & Laptop User Guide or Attix5 Pro Server Edition User Guide).

*Once the new Backup Account is created via the Backup Client, the Account name will display on the **Accounts** tab in the Account Management view and users with the correct permissions will be able to manage those Backup Accounts.*

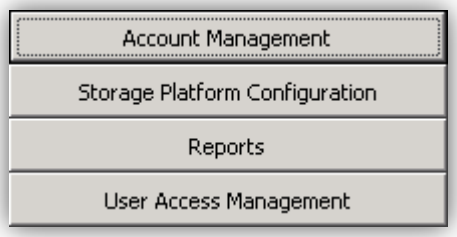


*Note: If a new Account is added while you are working on the **Accounts** tab, you may need to refresh the tab to view the latest list. To do this, click the **Refresh** button on the toolbar.*

Step 5: Start managing the backup environment

To manage the backup environment:

1. Depending on the type of management to be performed, click the relevant view button in the view selector:



   Note: The views available depend on the user access rights assigned to you by your Backup Administrator. As an Admin user, you have access to all the options described below.

2. Use the management tools available in the selected view to manage the backup features. For more information on tools, tasks and views, see:
   - Chapter 6, "Account Management"
   - Chapter 7, "Storage Platform Configuration"
   - Chapter 8, "Reports"
   - Chapter 9, "User Access Management"

Chapter 3: Installation

Installing the SP Console on a computer enables its users to manage the Storage Platform. User Access Management enables you to provide SP access to everyone involved in its administration, with the option of limiting the functionality available to each user.

*Note: For the latest system requirements and compatibility information, please refer to the **System Requirements and Compatibility Matrix**.*

Setup Wizard

To install the Storage Platform Console:

1. Run the SP Console installer issued to you by your software provider. This will launch the SP Console Setup Wizard.
2. Follow the Setup Wizard steps as described below.

Notes:

- *The SP Console installer will automatically detect if an earlier version is installed. If so, it will launch any necessary updates. The updated SP Console will retain the display and connection settings of the previous version and use the same directory locations (unless different locations are specified during the installation, in which case it will store the settings in the new Console locations).*
- *The SP Console installer will run automatically after the Storage Platform installation if located in the same folder as the Storage Platform installer.*

The Setup Wizard typically consists of six steps that guide you through a relatively complex task in a simple, step-by-step manner and allow you to undo previous operations by navigating backward.

Step 1 of 6: Start the wizard

To start the Setup Wizard:

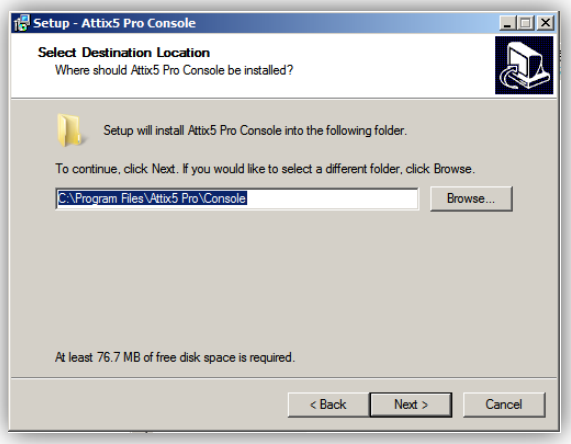
Click **Next** to begin the installation setup.

Setup - Attix5 Pro Console
Welcome to the Attix5 Pro Console Setup Wizard
This will install Attix5 Pro Console on your computer.
It is recommended that you close all other applications before continuing.
It is also recommended that you close all instances of Attix5 Pro Console before continuing.
Click Next to continue, or Cancel to exit Setup.
Next >
Cancel

Step 2 of 6: Select a destination location

To specify where the SP Console should be installed:

- Either accept the default location by clicking **Next**;
- Or click the **Browse** button, specify a different location, and then click **Next**.

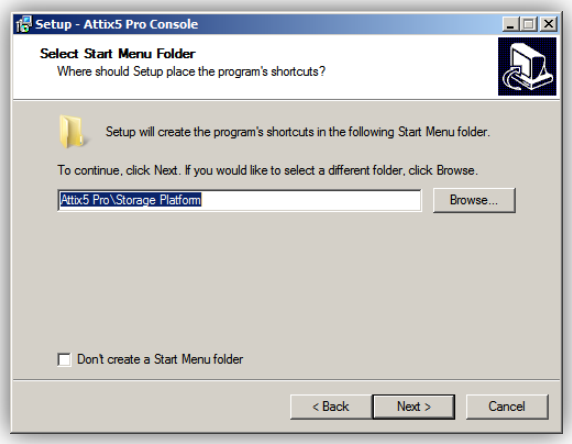

Setup - Attix5 Pro Console
Select Destination Location
Where should Attix5 Pro Console be installed?
Setup will install Attix5 Pro Console into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files\Attix5 Pro\Console
Browse...
At least 76.7 MB of free disk space is required.
< Back
Next >
Cancel

Step 3 of 6: Select a Start menu folder

To select the Start menu location:

- Either accept the default location by clicking **Next**;
- Or click the **Browse** button, specify a different location, and then click **Next**.

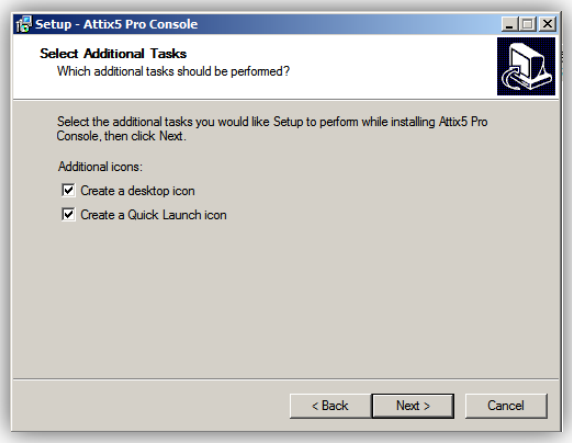
> *Tip: If you do not wish to add an SP Console menu item to the Start Menu, select the **Don't create a Start Menu folder** check box at the bottom of the wizard screen.*


Setup - Attix5 Pro Console
Select Start Menu Folder
Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.
Attix5 Pro\Storage Platform
Browse...
Don't create a Start Menu folder
< Back
Next >
Cancel

Step 4 of 6: Select additional tasks

To create additional icons:

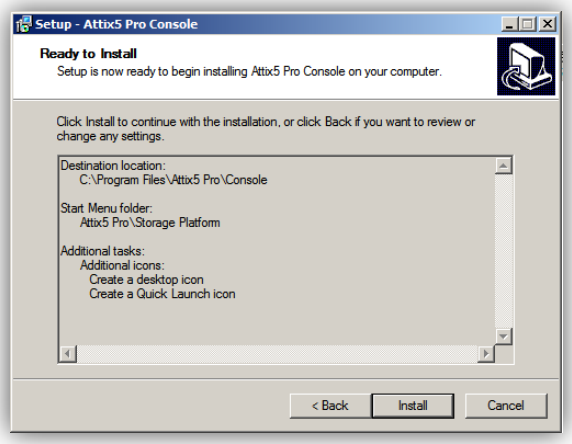
1. Select the icons to be created. The following options are available:
   - Desktop icon
   - Quick Launch icon
2. Click **Next** to continue.


Setup - Attix5 Pro Console
Select Additional Tasks
Which additional tasks should be performed?
Select the additional tasks you would like Setup to perform while installing Attix5 Pro Console, then click Next.
Additional icons:
Create a desktop icon
Create a Quick Launch icon
< Back
Next >
Cancel

Step 5 of 6: Begin the installation

To begin the installation:

Click **Install**.


Setup - Attix5 Pro Console
Ready to Install
Setup is now ready to begin installing Attix5 Pro Console on your computer.
Click Install to continue with the installation, or click Back if you want to review or change any settings.
Destination location:
C:\Program Files\Attix5 Pro\Console
Start Menu folder:
Attix5 Pro\Storage Platform
Additional tasks:
Additional icons:
Create a desktop icon
Create a Quick Launch icon
< Back
Install
Cancel

Step 6 of 6: Close the wizard

To close the wizard:

1. Ensure that the **Launch Storage Platform Console** check box is selected.
2. Click **Finish**.

Setup - Attix5 Pro Console
Completing the Attix5 Pro Console Setup Wizard
Setup has finished installing Attix5 Pro Console on your computer. The application may be launched by selecting the installed icons.
Click Finish to exit Setup.
Launch Attix5 Pro Console
Finish

Chapter 4: Connection

Once the Storage Platform Console is installed on a computer, you can open the Graphical User Interface (GUI) and connect to a Storage Platform (via the AccountServer) or directly to a MirrorServer. You can access the GUI via the:

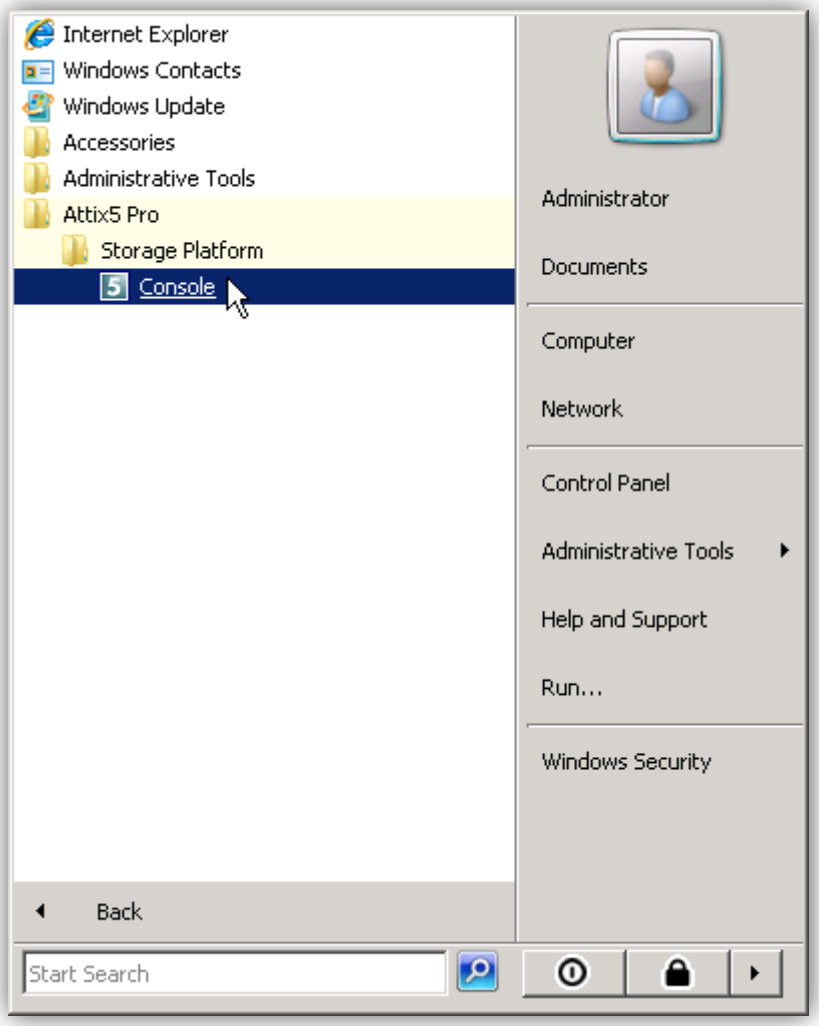
- **Start** menu;
- Desktop or
- Quick Launch toolbar

Note: *Whether Desktop and Quick Launch shortcuts are available depends on the shortcut icons selected during the installation process (see* Step 4 of 6: Select additional tasks *in Chapter 3, "Installation").*

Opening the GUI

To open the SP Console GUI from the Start menu:

Navigate to **Start > All Programs > Attix5 Pro > Storage Platform > Console**.



To open the SP Console GUI from the desktop:

Double-click the **Storage Platform Console** icon.

To open the SP Console GUI from the Quick Launch toolbar:

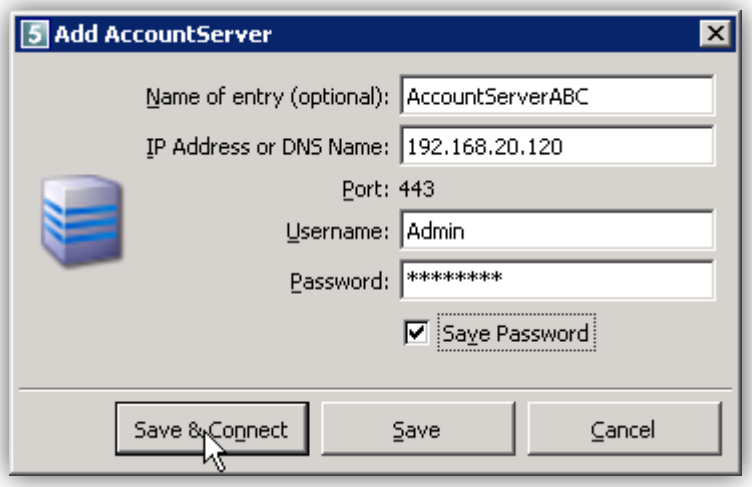
Click the SP Console Quick launch button on the Quick Launch toolbar.

Connecting to a Storage Platform

You can use the SP Console to connect to the Storage Platform via the AccountServer. This ensures that you have access to all the rights and permissions assigned to your Access user role. For more information, see Chapter 9, "User Access Management".

To connect to a Storage Platform for the first time:

1. When opening the SP Console for the first time, an **Add AccountServer** dialog box appears, enabling you to add the details of the AccountServer to connect to. Type the necessary information in the boxes provided.
2. Select the **Save Password** check box if you wish the SP Console to pre-populate the **Password** box for future connections.
3. Click **Save and Connect** to save the connection details for future use and connect to the AccountServer.



*Note: The **Save** button allows you to add multiple AccountServers to the connection list without having to connect to each AccountServer.*

Once a connection is established, the SP Console management interface appears, displaying all Backup Account Groups created on the Storage Platform and a host of related management options. For more information on the options available, see "SP Console interface" later in this chapter.

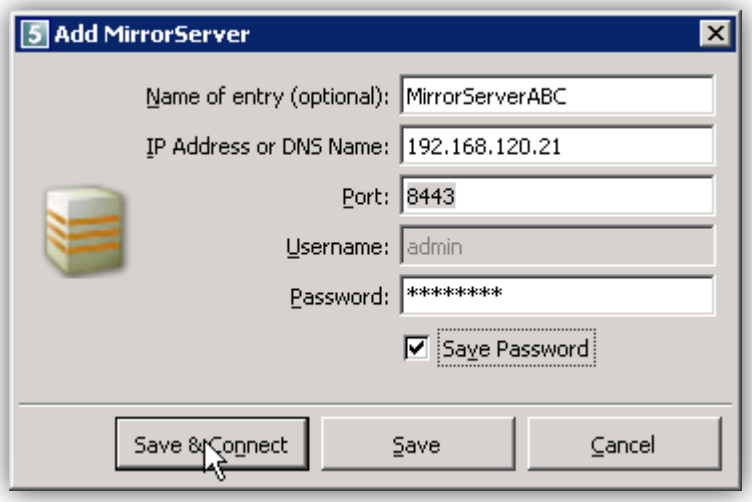
Connecting to a MirrorServer

While you can use the SP Console to connect to the Storage Platform via the AccountServer as described above, you can also connect directly to a MirrorServer (MS).

Note: Connecting to a MirrorServer using the method described below will enable you to configure the server without seeing any of the other servers' configuration information in the Console. To see all other servers on the Storage Platform as well, you can connect to a Storage Platform as described above. All MirrorServer(s) in the Storage Platform will be listed beneath their associated StorageServer node(s) in the Storage Platform Configuration tree.

To connect directly to a MirrorServer for the first time:

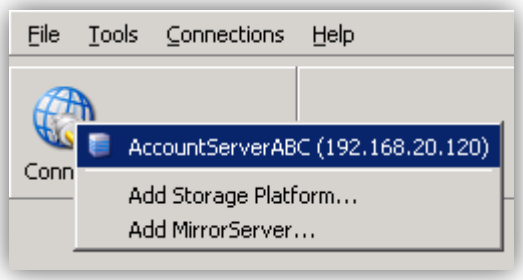
1. Click the **Connect** button.
2. In the connections list that appears, click **Add MirrorServer**.
3. In the **Add MirrorServer** dialog box that appears, type a display name in the **Name of entry** box.
4. Type the server's IP address or DNS name in the **IP Address or DNS Name** box.
5. In the **Password** box, type the administrator password.
6. Select the **Save Password** check box if you wish the SP Console to pre-populate the **Password** box for future connections.
7. Click **Save & Connect**.



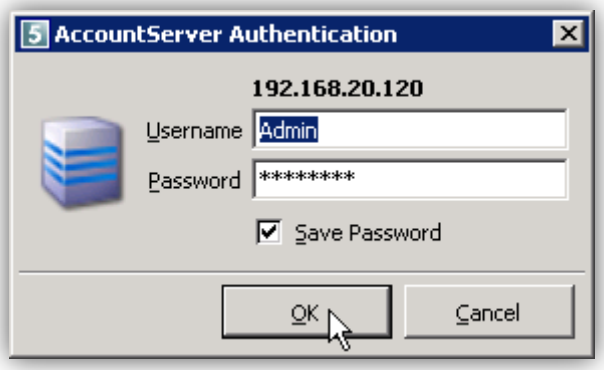
Notes:

- *The **Save** button allows you to add multiple AccountServers to the connection list without having to connect to each AccountServer.*
- *Access Users logging into the MirrorServer using this method will have limited options available to them, depending on the user permissions granted by the administrator. For more information on user permissions, see Chapter 9, "User Access Management".*

To connect to an AccountServer or MirrorServer already added to the SP Console:



1. Click the **Connect** button to view the connection list.
2. Click the name of the AccountServer or MirrorServer you wish to connect to.
3. In the **Authentication** dialog box that appears, type your username and password in the boxes provided.
4. Select the **Save Password** check box if you wish the SP Console to pre-populate the **Password** box for future connections.
5. Click **OK**.



Once a connection is established, the SP Console management interface appears, displaying the server information and providing you with applicable management options.

Chapter 5: Graphical User Interface (GUI)

You can open the Graphical User Interface using the:

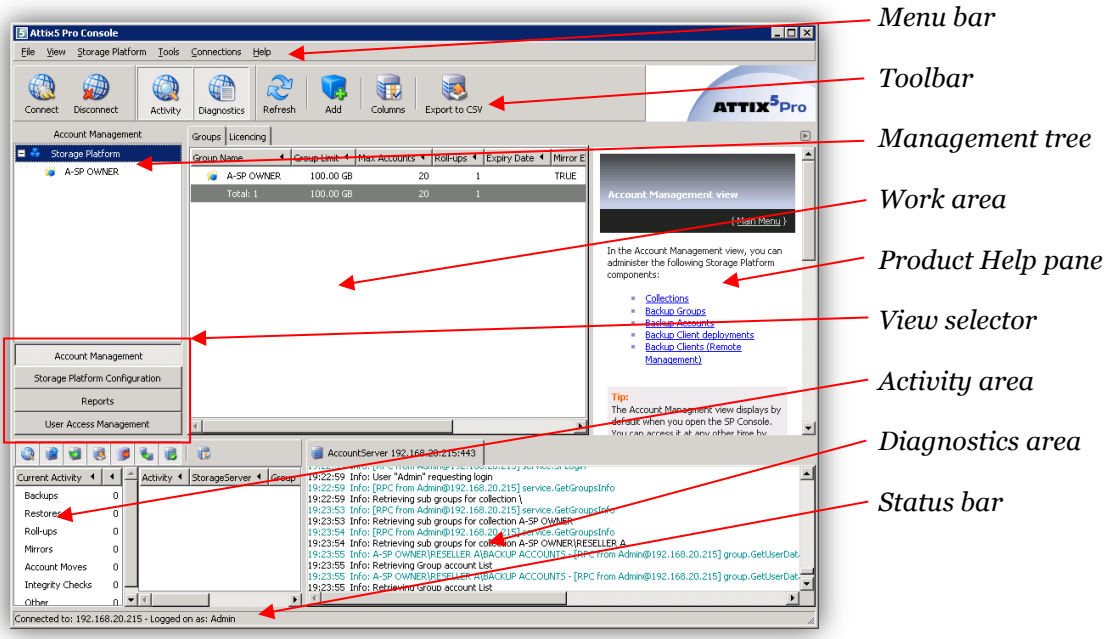
- SP Console **Start** menu item;
- SP Console Desktop icon or
- SP Console Quick Launch toolbar icon

> ***Note:*** *Whether Desktop and Quick Launch shortcuts are available depends on the shortcut icons selected during the installation process (see* Step 4 of 6: Select additional tasks *in Chapter 3, "Installation").*

For more information on opening the GUI, see Chapter 4, "Connection".

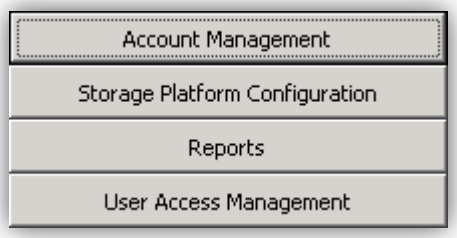
SP Console interface

SP Console features and functions are grouped in an easy-to-use layout:



View selector

The view selector enables you to select the SP Console view you wish to work in by clicking the appropriate button.



There are four views available to the admin user.

Note: The views available depend on the user access rights assigned to you by your Backup Administrator. Admin user rights will grant you access to all the views described below. For more information on user permissions, see Chapter 9, "User Access Management".

SP Console views

Account Management view

Click the **Account Management** button in the view selector to manage Collections, Backup Groups, Backup Accounts, and licencing.

Storage Platform Configuration view

Click the **Storage Platform Configuration** button in the view selector to configure the AccountServer and StorageServer(s) as well as any MirrorServers and/or Slave AccountServers that form part of your backup environment.

Reports view

Click the **Reports** button in the view selector to manage Standard and Enterprise Reports (if licenced).

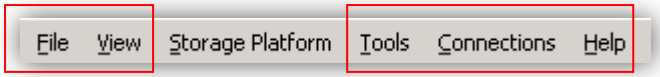
User Access Management view

Click the **User Access Management** button in the view selector to configure Storage Platform user access permissions.

Note: Only the functions and permissions enabled by the Backup Administrator will be available to the user logging in with an audit trail logged. For more information on user permissions, see Chapter 9, "User Access Management".

Menu bar and toolbar buttons

Menus available in all views

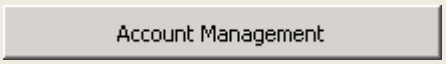
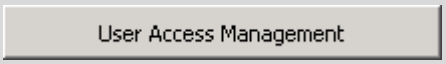


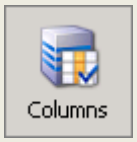
Five menus always display on the menu bar, regardless of the view being worked in:

- File
- View
- Tools
- Connections
- Help

The following tables provide descriptions of the options available in each menu and screenshots of buttons where applicable.

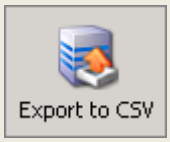
File menu		
Options	**Description**	**Button**
Exit	Click **Exit** to disconnect from the SP and close the SP Console.	

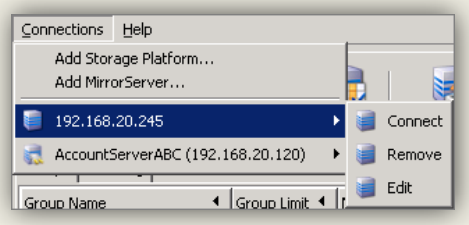
View menu	Use the **View** menu to switch between different views and show or hide the Activity and Diagnostics areas. ***Note:*** *For detailed information on each of the views and areas, see Chapters 5 - 8 as well as "Activity area" and "Diagnostics area" later in this chapter.*	
Options	**Description**	**Button**
Account Management	Click **Account Management** to switch to the Account Management view.	
Storage Platform Configuration	Click **Storage Platform Configuration** to switch to the Storage Platform Configuration view.	
Reports	Click **Reports** to switch to the Reports view.	
User Access Management	Click **User Access Management** to switch to the User Access Management view.	
Activity	Select **Activity** to show the Activity area. Deselect **Activity** to hide the area. For more information on the Activity display options, see "Activity area" later in this chapter.	
Diagnostics	Select **Diagnostics** to show the Diagnostics area. Deselect **Diagnostics** to hide the area. For more information on the Diagnostics display options, see "Diagnostics" later in this chapter.	

View menu continued...		
Options	**Description**	**Button**
Customize Columns	Click **Customize Columns** to access the list of columns available for display in the work area. All columns display by default. To hide any columns, clear the check boxes next to their column heading names.	
Filter Accounts	Click **Filter Accounts** to access the **Select Licences to Display in Groups** dialog box. You can use the options available to filter the Groups/Accounts that display based on the licences they possess. *Note: This option is only available when a Backup Group/Account is selected in the Account Management view.*	

Tools menu		
Options	**Description**	**Menu**
Options	Click **Options** to access the **Options** dialog box, which allows you to configure the SP connection, display, and fixed views settings. **Connection tab** The **Connection** tab allows you to specify the Internet connection settings. Select the type of configuration to use, specify additional information if required, and then click **OK** to save your settings. **Display tab** The **Display** tab provides a range of different display settings. In the **Colour Options** area, you can configure the SP Console to provide a visual alert when certain parameters are met in the Account Management pane by displaying items in particular colours. These colours may be changed	

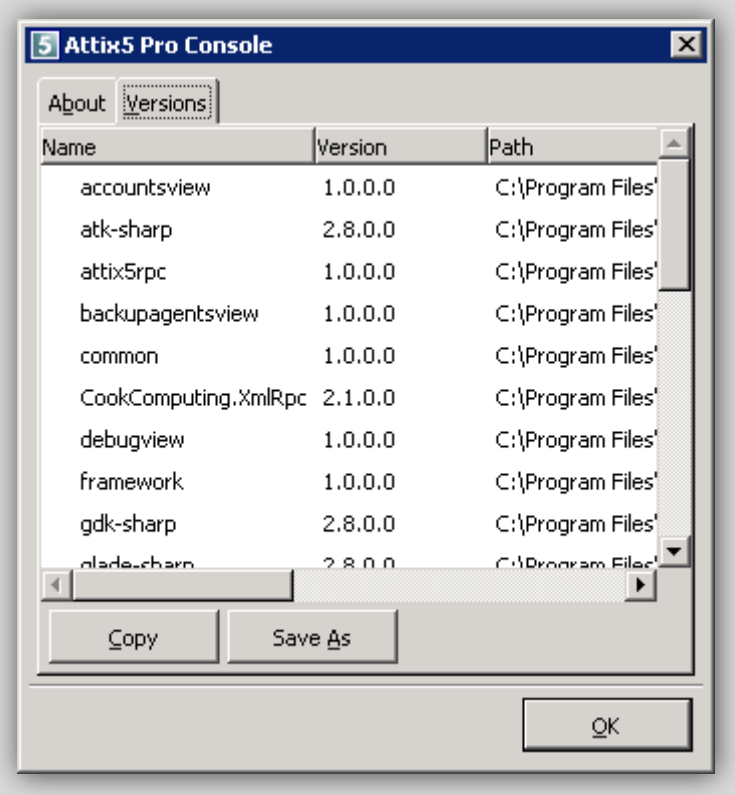
Tools menu continued...	
Options	**Description**
Options *contd.*	according to your preferences by clicking the relevant colour box, selecting a new colour, and then clicking **OK**. **Colour options and default settings:** ▪ **Number of days since last backup** with 7 days and red as the default ▪ **Percentage of account limit used** set to 90% and orange as the default. ▪ **Disabled group** with red selected as the default ▪ **Disabled account** with grey selected as the default ▪ **User over limit** with yellow selected as the default ▪ **Grid Lines** with a very light blue (#F0F0FF) selected as the default In the **Plug-ins** area, you can choose how plug-in information displays in the Account Management view's **Plug-ins** column. The default selection, **Combo box**, displays the plug-in names in a drop-down list if more than one plug-in is installed. The **List** option displays plug-in names in a list format; one plug-in name per line. In the **Main Toolbar** area, you can specify the preferred style of the toolbar. (E.g. Select **Icons Only** to remove the toolbar text.) **Fixed Views tab** The **Fixed Views** tab enables you to choose whether the **Activity** and **Diagnostics** areas must be displayed as additional views in the view selector or whether they should always be visible at the bottom of the Storage Platform Console. As with the main toolbar, you can change the style and icon size. You can also choose the layout of the two sections in the **Orientation** area. For more information on the Activity and Diagnostics areas, see "Activity area" and "Diagnostics area" later in this chapter.

Tools menu continued...		
Options	**Description**	**Button**
Export to CSV	Click **Export to CSV** to export the Backup Groups and Backup Accounts information on the **Accounts** tab to a CSV file. *Note: This option is only available when a Backup Group or Account is selected in the Account Management view.*	

Connections menu	The **Connections** menu enables you to add, remove and edit AccountServers within the Storage Platform.	
Options	**Description**	**Menu**
Add Storage Platform	Click **Add Storage Platform** to add a Storage Platform connection to the SP Console.	
Add MirrorServer	Click **Add MirrorServer** to add a MirrorServer connection to the SP Console.	
<AccountServer>	The **Connections** menu lists all AccountServers that the SP Console has been configured to connect to. Point to the name of an AccountServer to access **Connect**, **Remove** and **Edit** options. For more information, see *AccountServer* in Chapter 6, "Storage Platform Configuration".	

Help menu	
Options	**Description**
Product Help	Click **Product Help** to open the Storage Platform Console Product Help panel. This panel, which displays to the right of the work area (see "SP Console interface" earlier in this chapter), provides intuitive help related to the pane you are working in.
About	Click **About** to view the Attix5 Pro Storage Platform Console splash screen and to access the **Versions** tab, which contains a list of all installed DLLs and their version numbers. **Splash screen:**

Help menu continued...	
Options	**Description**
About *contd.*	**Versions tab:**

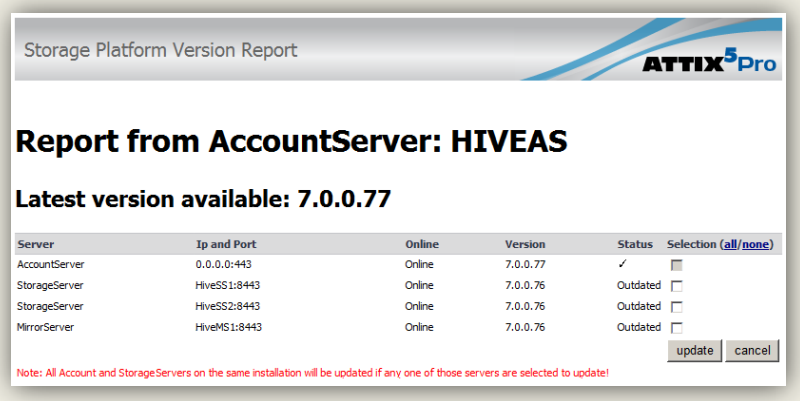


Copy button

Click the **Copy** button to copy the contents of the tab to the Clipboard. You can then paste it into another text application such as Notepad.

Save As button

Click the **Save As** button to save a text version of the **Versions** tab contents.

Help menu continued...	
Options	**Description**
Manage Updates	After you have manually updated the AccountServer, you can use the **Manage Updates** option to update associated StorageServers and MirrorServers from the SP Console. *Notes:* ▪ *Slave ASs and shared MirrorServers cannot be selected for updating. However, if a single SS/MS is selected for updating, all Slave AccountServers/StorageServers/MirrorServers on the same server will be updated.* ▪ *Only StorageServers and MirrorServers installed via the Storage Platform installer can be updated using this feature.* ▪ *Only MirrorServers that are mirrored to using the "admin" account can be updated using this feature.* Click **Manage Updates** to launch the Storage Platform Version Report in a web browser. *Note: You may encounter a certificate error before reaching the report. If you do, ignore it and continue to the website.* The report details the latest version of the Storage Platform that is available (the version of the AccountServer that you manually updated) as well as the versions of all the StorageServers and MirrorServers linked to the AccountServer. It provides the option to update each component that is not on the latest version. The report also supplies a range of other information, such as the components' IP and port, online status, version and update status.  Storage Platform Version Report ATTIX5 Pro **Report from AccountServer: HIVEAS** **Latest version available: 7.0.0.77** Server / Ip and Port / Online / Version / Status / Selection (all/none) AccountServer / 0.0.0.0:443 / Online / 7.0.0.77 / ✓ StorageServer / HiveSS1:8443 / Online / 7.0.0.76 / Outdated StorageServer / HiveSS2:8443 / Online / 7.0.0.76 / Outdated MirrorServer / HiveMS1:8443 / Online / 7.0.0.76 / Outdated update cancel Note: All Account and StorageServers on the same installation will be updated if any one of those servers are selected to update!

Help menu continued...	
Options	**Description**
Manage Updates *contd.*	To update a StorageServer or MirrorServer, select it in the **Selection** column and click **Update**. You can cancel any updates by selecting the appropriate component and clicking **Cancel**. *Notes: While an update is in progress, the online status will change to offline for the duration of the upgrade.* The status column can show one of the following: ▪ Check mark – Indicates that the component is using the latest version ▪ Queued – Indicates that the component is queued for update ▪ Outdated – Indicates that there is a newer version available

Special menus and toolbar buttons

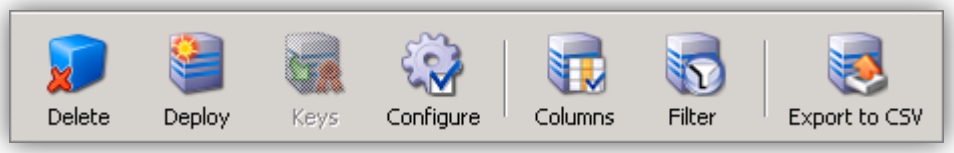
The following menus are only available on the menu bar when you are working in their corresponding views:

- **Storage Platform/Collection/Group/Account** – Available in the Account Management view.
- **AccountServer/StorageServers/StorageServer/MirrorServer/Slave AccountServers/Slave AccountServer** – Available in the Storage Platform Configuration view.
- **Reports** – Available in the Reports view.
- **Access Users/Access Groups/Roles** – Available in the User Access Management view.

Note: For an overview of the views available, see "SP Console views" earlier in this chapter. For detailed descriptions of the functions in each view, see Chapters 5-8.

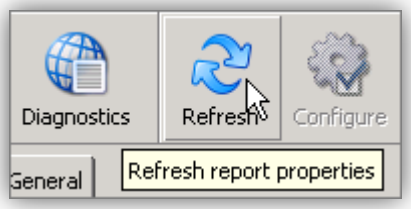
The toolbar buttons available are also dependent on the view selected in the view selector.

*Example: When you click the **Account Management** button in the view selector and you select a Group in the Account Management tree, Group-related management buttons display on the toolbar:*



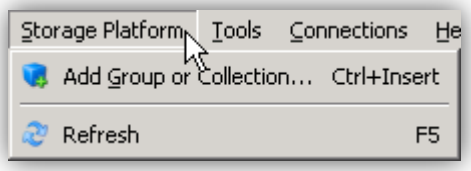
*However, when you click the **Reports** button, the toolbar changes to display report-related buttons:*

Tip: Mouse-over comments are provided for additional information about the enabled toolbar buttons. Simply move the mouse pointer over a toolbar button; the comment will be displayed within a second.



Storage Platform menu (Account Management view)

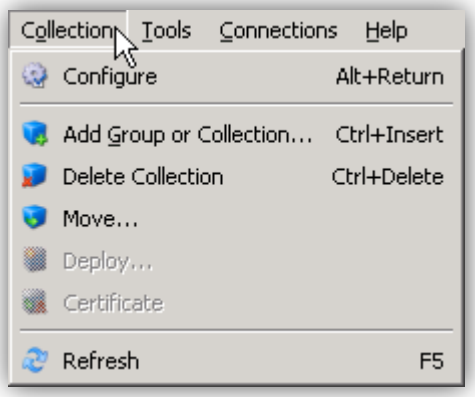
When **Storage Platform** is selected in the Account Management tree, the **Storage Platform** menu is available on the menu bar.



Storage Platform menu		
Options	**Description**	**Button**
Add Group or Collection	Click **Add Group or Collection** to add a new Backup Group or Collection to the SP Console. For more information, see *Collections* and *Backup Groups* in Chapter 6, "Account Management".	
Refresh	Click **Refresh** to refresh the Account Management tree and the work area. The Console will connect to the AccountServer, retrieve the Group Data List and then update all information displayed.	

Collection menu (Account Management view)

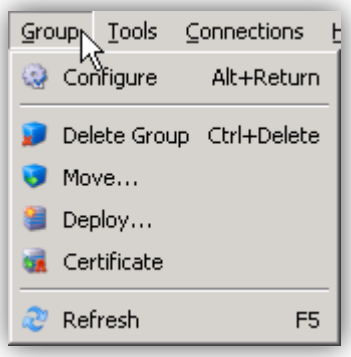
When a Collection is selected in the Account Management tree, the **Collection** menu is available on the menu bar.



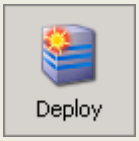
Collection menu		
Options	**Description**	**Button**
Configure	Click **Configure** to access the **Configure Collection** dialog box that enables you to change the Collection settings. *Note: To edit a Collection's settings, you need to select the Collection in the Account Management tree. Once the Collection is selected, the **Configure** button on the toolbar will activate.* For more information on configuring Collections, see *Collections* in Chapter 6, "Account Management".	
Add Group or Collection	Click **Add Group or Collection** to add a new Backup Group or Collection to the SP Console. For more information, see *Collections* and *Backup Groups* in Chapter 6, "Account Management".	
Delete Collection	Click **Delete Collection** to delete a Collection from the SP Console. ***Warning:** Deleting a Collection will remove all information about the Collection from the SP Console.*	
Move	Click **Move** to move the Collection to another Collection. *Note: All licences allocated to the Collection will be moved to the target Collection.*	
Refresh	Click **Refresh** to refresh the Account Management tree and the work area. The Console will connect to the AccountServer, retrieve the Group Data List and update all information displayed.	

Group menu (Account Management view)

When a Group is selected in the Account Management tree, the **Group** menu is available on the menu bar.

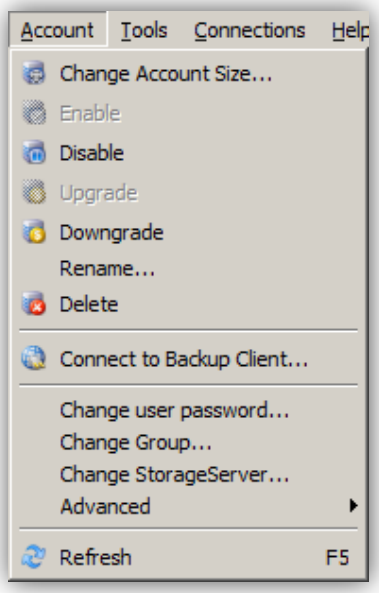


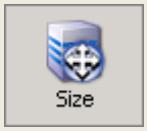
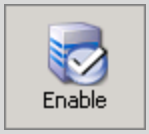
Group menu		
Options	**Description**	**Button**
Configure	Click **Configure** to access the **Configure Group** dialog box that enables you to change the Group settings. *Note: To edit a Group's settings, you need to select the Group name in the Account Management tree. Once selected, the **Configure** button on the toolbar will activate.* For more information on configuring Groups, see *Backup Groups* in Chapter 6, "Account Management".	
Delete Group	Click **Delete Group** to delete a Backup Group from the SP Console. ***Warning:** Deleting a Backup Group will remove all information about the Group from the SP Console.*	

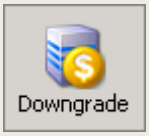
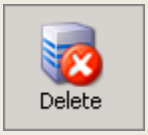
Group menu continued...		
Options	**Description**	**Button**
Deploy	Click **Deploy** to access the Deployment Wizard, which allows you to create a Client deployment file for the selected Backup Group. For more information on creating Client deployment files, see *Deployment Wizard* in Chapter 6, "Account Management".	
Certificate	Click **Certificate** to access the **Group Certificate** dialog box that enables you to request, upload, modify and view certificates.	
Move	Click **Move** to move the Group between Collections. For more information, see *Moving Groups* in Chapter 6, "Account Management".	
Refresh	Click **Refresh** to refresh the Account Management tree and the work area. The Console will connect to the AccountServer, retrieve the Group Data List and update all information displayed.	

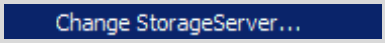
Account menu (Account Management view)

When an Account is selected in the Account Management view's work area, the **Account** menu is available on the menu bar.



Account menu		
Options	**Description**	**Button**
Change Account Size	This option enables you to change the limit applied to the amount of data that the Account is allowed to back up (in GB). For more information, see *Changing an Account's size* in Chapter 6, "Account Management".	
Enable	Click this button to enable an Account, thereby allowing it to back up to the Storage Platform. For more information, see *Enabling an Account* in Chapter 6, "Account Management".	

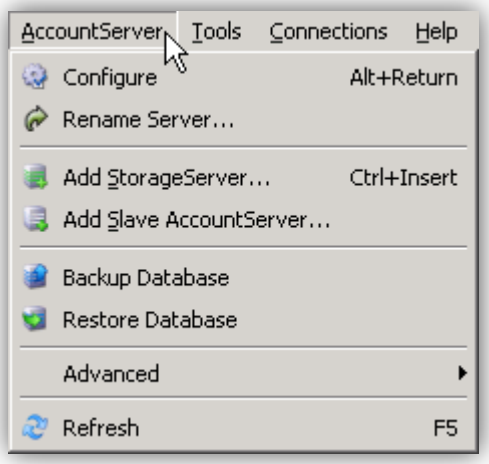
Account menu continued...		
Options	**Description**	**Button/Menu**
Disable	Click this button to disable a Backup Account, thereby preventing it from backing up to the Storage Platform. For more information, see *Disabling an Account* in Chapter 6, "Account Management".	
Upgrade	Click this button to upgrade the Backup Account from *Evaluation* to *Registered* status. For more information, see *Upgrading an Account* in Chapter 6, "Account Management".	
Downgrade	Click this button to downgrade the Backup Account from *Registered* to *Evaluation* status. For more information, see *Downgrading an Account* in Chapter 6, "Account Management".	
Rename	This option enables you to change the display name of the Backup Account. ***Note:*** *At the next backup or restore, the Backup Client will adopt the new name and update its details accordingly.* For more information, see *Renaming a Backup Account* in Chapter 6, "Account Management".	
Delete	Click this button to permanently delete the Backup Account and all backup sets belonging to it. For more information, see *Adding and deleting Accounts* in Chapter 6, "Account Management".	

Account menu continued...		
Options	**Description**	**Button/Menu**
Connect to Backup Client	This option enables you to connect to the Backup Client remotely. For more information, see *Remote management* in Chapter 6, "Account Management".	
Change user password	Click this option to access the **Change password...** dialog box that enables you to provide a new user password for an Account user. For more information, see *Changing a user password* in Chapter 6, "Account Management".	
Change Group	This option enables you to change the Backup Group that the Backup Account belongs to. For more information, see *Changing the Backup Group* in Chapter 6, "Account Management".	
Change StorageServer	This option enables you to change the StorageServer that the Backup Account belongs to. For more information, see *Changing the StorageServer* in Chapter 6, "Account Management".	
Advanced > Import Backup Snapshot	This option enables you to import a Snapshot backup. For more information, see *Importing a Backup Snapshot* in Chapter 6, "Account Management".	

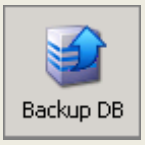
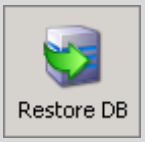
Account menu continued...		
Options	**Description**	**Button/Menu**
Advanced > Export Restore Snapshot	This option enables you to export a Snapshot. For more information, see *Exporting a Restore Snapshot* in Chapter 6, "Account Management".	
Advanced > Integrity Checks > Initiate Integrity Check now	Use this option to manually initiate Integrity Checks. For more information, see *Performing/Scheduling Integrity Checks* in Chapter 6, "Account Management".	
Advanced > Integrity Checks > Schedule an Integrity Check	Us e this option to schedule automatic Integrity Checks. For more information, see *Performing/Scheduling Integrity Checks* in Chapter 6, "Account Management".	
Advanced > Override Storage Server IP	Use this option to override the StorageServer IP address. For more information, see *Overriding the StorageServer IP* in Chapter 6, "Account Management".	
Advanced > Copy Account Guid to Clipboard	Use this option to copy the Backup Account GUID to the Clipboard. Only available by right-clicking a Backup Account.	
Refresh	Click **Refresh** to refresh the Account Management tree and the work area. The Console will connect to the AccountServer, retrieve the Group Data List and update all information displayed.	

AccountServer menu (Storage Platform Configuration view)

When **AccountServer** is selected in the Storage Platform Configuration tree, the **AccountServer** menu is available on the menu bar.



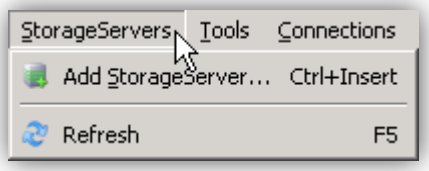
AccountServer menu		
Options	**Description**	**Button/menu**
Configure	Click **Configure** to access the **Configure AccountServer** dialog box that enables you to change the AccountServer settings. For more information on configuring the AccountServer, see *AccountServer* in Chapter 6, "Storage Platform Configuration".	
Rename Server	You can use this option to change the AccountServer display name. *Tip: You can use this option to specify a "friendly name" for the server. This name will be displayed in the Account Management tree alongside the IP address.*	

AccountServer menu continued...		
Options	**Description**	**Button/Menu**
Add StorageServer	This option enables you to add a StorageServer to the AccountServer. For more information, see *Adding, removing and renaming StorageServers* in Chapter 6, "Storage Platform Configuration".	
Add Slave AccountServer	This option enables you to add a Slave AccountServer to the Storage Platform. For more information, see *Adding and removing Slave AccountServers* in Chapter 6, "Storage Platform Configuration".	
Backup Database	This option enables you to back up the AccountServer database. For more information, see *Backing up/restoring the AccountServer database* in Chapter 6, "Storage Platform Configuration".	
Restore Database	This option enables you to restore the AccountServer database using the latest database backup. For more information, see *Backing up/restoring the AccountServer database* in Chapter 6, "Storage Platform Configuration".	

AccountServer menu continued...		
Options	**Description**	**Menu**
Advanced > Update Licence Info	Click this option to retrieve the latest activation data from the LicenceServer. For more information, see *Updating licence information* in Chapter 6, "Storage Platform Configuration".	
Advanced > Activation Information	This option enables you to view an online page displaying the LicenceServer activation information. For more information, see *Viewing activation information* in Chapter 7, "Storage Platform Configuration".	
Advanced > Change Master Password	This option enables you to change the password for the AccountServer, StorageServers, Slave AccountServers and MirrorServers that form the Storage Platform. For more information, see *Master password* in Chapter 6, "Storage Platform Configuration".	
Refresh	Click **Refresh** to refresh the Storage Platform Configuration tree. The SP Console will connect to the AccountServer and StorageServer and update all information displayed.	

StorageServers menu (Storage Platform Configuration view)

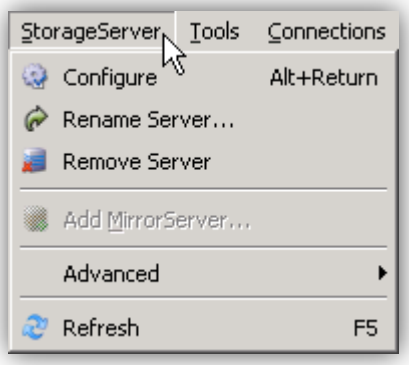
When **StorageServers** is selected in the Storage Platform Configuration tree, the **StorageServers** menu is available on the menu bar.



StorageServers menu		
Options	**Description**	**Button**
Add StorageServer	This option enables you to add a StorageServer to the Storage Platform. For more information, see *Adding, removing and renaming StorageServers* in Chapter 6, "Storage Platform Configuration".	
Refresh	Click **Refresh** to refresh the Storage Platform Configuration tree. The SP Console will connect to the AccountServer and StorageServer and update all information displayed.	

StorageServer menu (Storage Platform Configuration view)

When a StorageServer name is selected in the Storage Platform Configuration tree, the **StorageServer** menu is available on the menu bar.



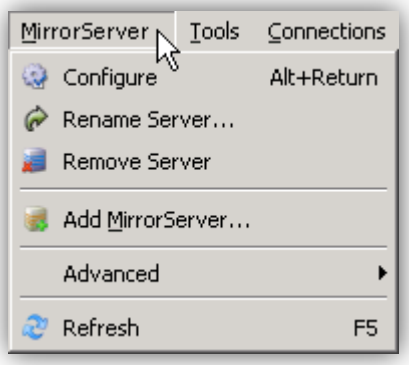
StorageServer menu		
Options	**Description**	**Toolbar Button**
Configure	Click **Configure** to access the **Configure StorageServer** dialog box that enables you to change the StorageServer settings. For more information on configuring the AccountServer, see *StorageServers* in Chapter 6, "Storage Platform Configuration".	
Rename Server	You can use this option to change the StorageServer's display name. *Tip: You can use this option to specify a "friendly name" for the server. This name will be displayed in the Storage Platform Configuration tree, alongside the IP address.*	
Remove Server	Click **Remove Server** to remove the StorageServer from the Storage Platform.	

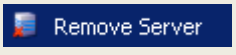
StorageServer menu continued...		
Options	**Description**	**Toolbar Button**
Add MirrorServer	You can use this option to add a MirrorServer to the StorageServer. For more information, see *MirrorServers* in Chapter 6, "Storage Platform Configuration".	
Advanced > Change StorageServer address	You can use this option to change the StorageServer IP address and port number. For more information, see *Managing the StorageServer IP address* in Chapter 6, "Storage Platform Configuration". ***Warning:*** *This option should be used with caution. It will redirect all Backup Clients that previously backed up to the StorageServer to the new address.*	
Advanced > Lock StorageServer	Click this option to lock the StorageServer, thereby preventing any new Backup Accounts from being added to it. ***Note:*** *When locked, the menu item will change to* ***Unlock StorageServer****, enabling you to allow Backup Accounts to be added the StorageServer again.*	
Advanced > Start Cleanup	Click this option to remove all duplicate files on the StorageServer.	

StorageServer menu continued...		
Options	**Description**	**Toolbar Button**
Refresh	Click **Refresh** to refresh the Storage Platform Configuration tree. The Console will connect to the AccountServer and StorageServer and update all information displayed.	

MirrorServer menu (Storage Platform Configuration view)

When a MirrorServer name is selected in the Storage Platform Configuration tree, the **MirrorServer** menu is available on the menu bar.

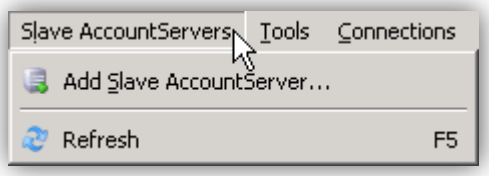


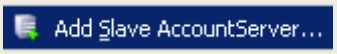
MirrorServer menu		
Options	**Description**	**Toolbar Button**
Configure	Click **Configure** to access the **Configure MirrorServer** dialog box that enables you to change the MirrorServer settings. For more information on configuring the MirrorServer, see *MirrorServers* in Chapter 6, "Storage Platform Configuration".	
Rename Server	You can use this option to change the MirorServer's display name. *Tip: You can use this option to specify a "friendly name" for the server. This name will be displayed in the Storage Platform Configuration tree, alongside the IP address.*	
Remove Server	Click **Remove Server** to remove the MirrorServer from the Storage Platform.	

MirrorServer menu continued...		
Options	**Description**	**Toolbar Button**
Add MirrorServer	You can use this option to add a MirrorServer to the MirrorServer. For more information, see *MirrorServers* in Chapter 6, "Storage Platform Configuration".	
Advanced > Change StorageServer address	You can use this option to change the MirrorServer IP address and port number. For more information, see *Managing the MirrorServer IP address* in Chapter 6, "Storage Platform Configuration". ***Warning:*** *This option should be used with caution. It will redirect all Backup Clients that previously backed up to the MirrorServer to the new address.*	
Advanced > Start Cleanup	Click this option to remove all duplicate files on the MirrorServer.	
Refresh	Click **Refresh** to refresh the Storage Platform Configuration tree. The Console will connect to the AccountServer and MirrorServer and update all information displayed.	

Slave AccountServers menu (Storage Platform Configuration view)

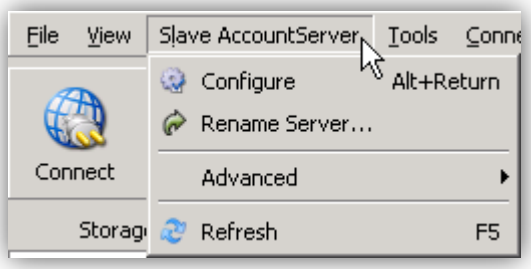
When the **Slave AccountServers** node is selected in the Storage Platform Configuration tree, the **Slave AccountServers** menu is available on the menu bar.



Slave AccountServers menu		
Options	**Description**	**Button/menu**
Add Slave AccountServer	This option enables you to add a Slave AccountServer to the Storage Platform. For more information, see Adding and removing Slave AccountServers in Chapter 6, “Storage Platform Configuration”.	
Refresh	Click **Refresh** to refresh the Storage Platform Configuration tree. The SP Console will connect to the AccountServer and Slave AccountServer and then update all information displayed.	

Slave AccountServer menu (Storage Platform Configuration view)

When a Slave AccountServer name is selected in the Storage Platform Configuration tree, the **Slave AccountServer** menu is available on the menu bar.

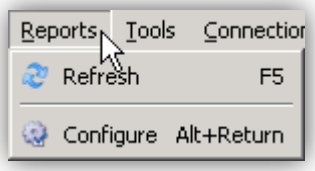


Slave AccountServer menu		
Options	**Description**	**Button/menu**
Configure	Click **Configure** to access the **Configure AccountServer** dialog box that enables you to change the AccountServer settings. For more information on configuring the AccountServer, see *Slave AccountServer* in Chapter 6, "Storage Platform Configuration".	
Rename Server	You can use this option to change the Slave AccountServer display name. *Tip: You can use this option to specify a "friendly name" for the server. This name will be displayed in the Storage Platform Configuration tree alongside of the IP address.*	
Advanced > Update Licence Info	Click this option to retrieve the latest activation data from the LicenceServer. For more information, see *Updating licence information* in Chapter 6, "Storage Platform Configuration".	

Slave AccountServer menu continued...		
Options	**Description**	**Button/menu**
Advanced > Change Master Password	This option enables you to change the password for all Slave AccountServer(s), main AccountServer(s), StorageServer(s), and MirrorServer(s) that form the Storage Platform. For more information, see Master password in Chapter 6, “Storage Platform Configuration”.	
Refresh	Click **Refresh** to refresh the Storage Platform Configuration tree. The SP Console will connect to the AccountServer and Slave AccountServer and then update all information displayed.	

Reports menu (Reports view)

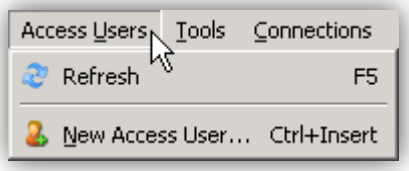
In the Reports view, the **Reports** menu is available on the menu bar.



Reports menu		
Options	**Description**	**Toolbar Button**
Refresh	Click **Refresh** to retrieve the latest figures from the AccountServer and update the information displayed in the work area accordingly.	
Configure	Click **Configure** to modify the general report properties or to configure a specific report's settings: **Modifying general report properties:** 1. In the Reports tree, select **Standard** or **Enterprise** and then click **Configure**. 2. In the **General Report Properties** dialog box that appears, configure the SMTP Settings, and then click **OK**. **Enabling and configuring a specific report:** 1. In the Reports tree, select a specific report (e.g. **Licence Report**) and then click **Configure**. 2. In the **Report Properties** dialog box that appears, select the **Enable this report** check box. 3. Modify/configure the report's E-mail settings and SyncSchedule using the options available. 4. Click **OK**.	

Access Users menu (User Access Management view)

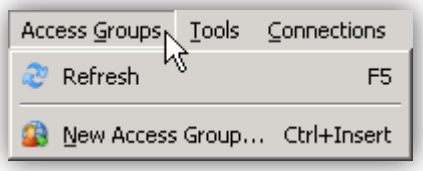
When **Access Users** is selected in the User Access Management tree, the **Access Users** menu is available on the menu bar.

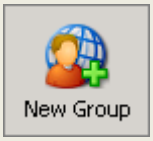


Access Users menu		
Options	**Description**	**Toolbar Button**
Refresh	Click **Refresh** to refresh the list of Access Users displayed in the work area.	
New Access User	Click **New Access User** to create a new Access User. For more information, see *Access Users* in Chapter 9, "User Access Management".	

Access Groups menu (User Access Management view)

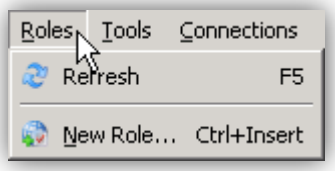
When **Access Groups** is selected in the User Access Management tree, the **Access Groups** menu is available on the menu bar.



Access Groups menu		
Options	**Description**	**Toolbar Button**
New Access Group	Click **New Access Group** to create a new Access Group. For more information, see *Access Groups* in Chapter 9, "User Access Management".	
Refresh	Click **Refresh** to refresh the list of Access Groups displayed in the work area.	

Roles menu (User Access Management view)

When **Roles** is selected in the User Access Management tree, the **Roles** menu is available on the menu bar.

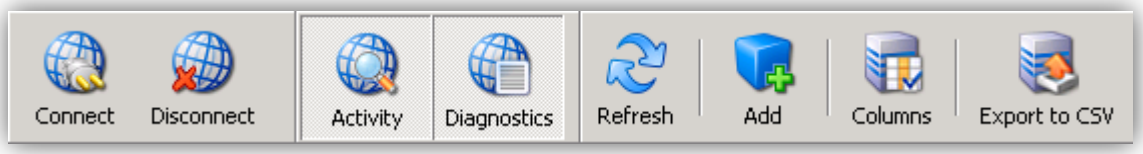


Roles menu		
Options	**Description**	**Toolbar Button**
Refresh	Click **Refresh** to refresh the list of Roles displayed in the work area.	
New Role	Click **New Access Role** to create a new Role. For more information, see *Roles* in Chapter 9, "User Access Management".	

Toolbar display settings

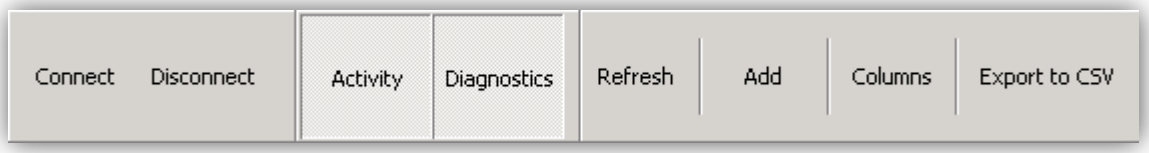
You can change the main toolbar display style to suit your viewing preference. Below are some examples.

Icons & Text (default)



Icons only

Text only



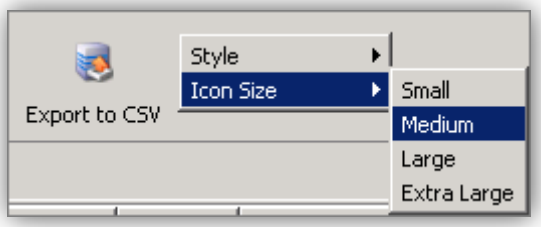
Icon sizes

Extra Large *Large* *Medium* *Small*

To change the main toolbar display settings:

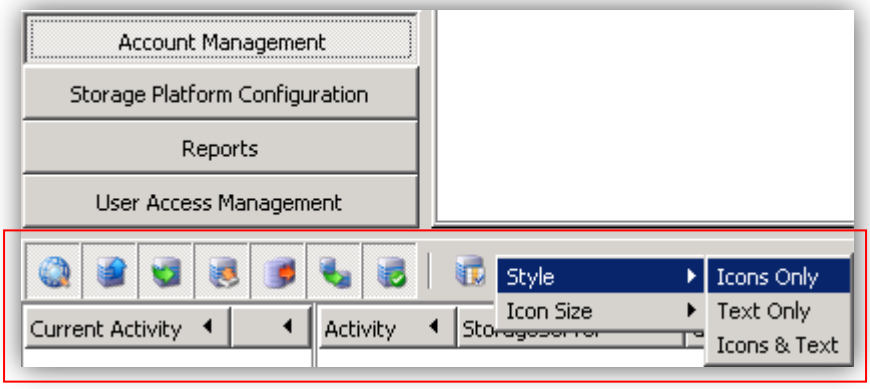
1. On the **Tools** menu, click **Options**.
2. Click the **Display** tab.
3. In the Main Toolbar area, select an option in the **Style** drop-down list.
   The following options are available:
   - **Icons & Text**
   - **Icons only**
   - **Text only**
4. Select an option in the **Icon size** drop-down.
   The following options are available:
   - **Small**
   - **Medium**
   - **Large**
   - **Extra Large**
5. Click **OK** to close the dialog box.

*Tip: Alternatively, right-click the grey area on the toolbar and use the **Style** and **Icon size** menus that appear to select the settings.*



Your changes will be applied immediately.

The same display settings are available for the Activity toolbar that displays below the view selector by default.



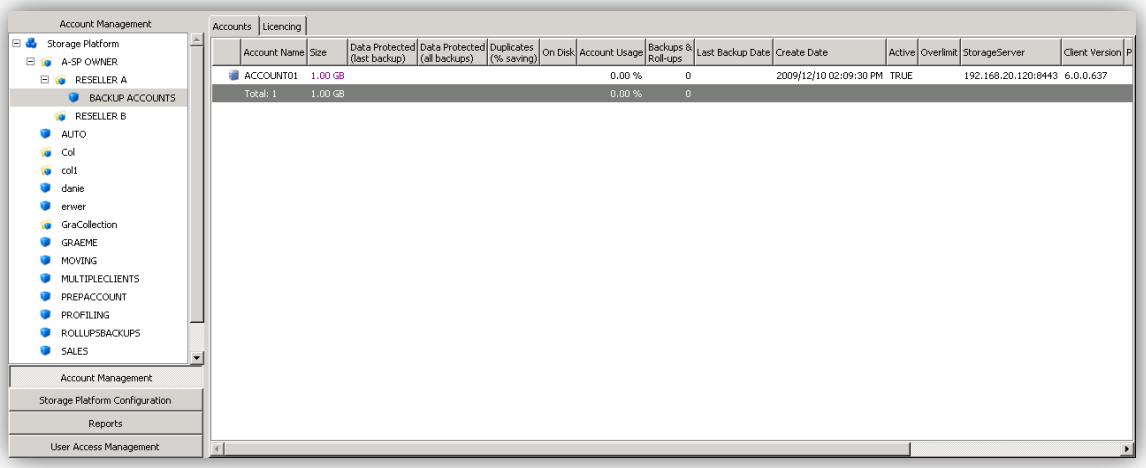
To change the Activity toolbar display settings:

1. On the **Tools** menu, click **Options**.
2. Click the **Fixed Views** tab.
3. In the Fixed-View Toolbars area, select an option in the **Style** drop-down list.
   The following options are available:
   - **Icons & Text**
   - **Icons only**
   - **Text only**
4. Select an option in the **Icon size** drop-down.
   The following options are available:
   - **Small**
   - **Medium**
   - **Large**
   - **Extra Large**
5. Click **OK** to close the dialog box.

*Tip: Alternatively, right-click the grey area on the toolbar and use the **Style** and **Icon size** menus that appear to select the settings.*

Work area

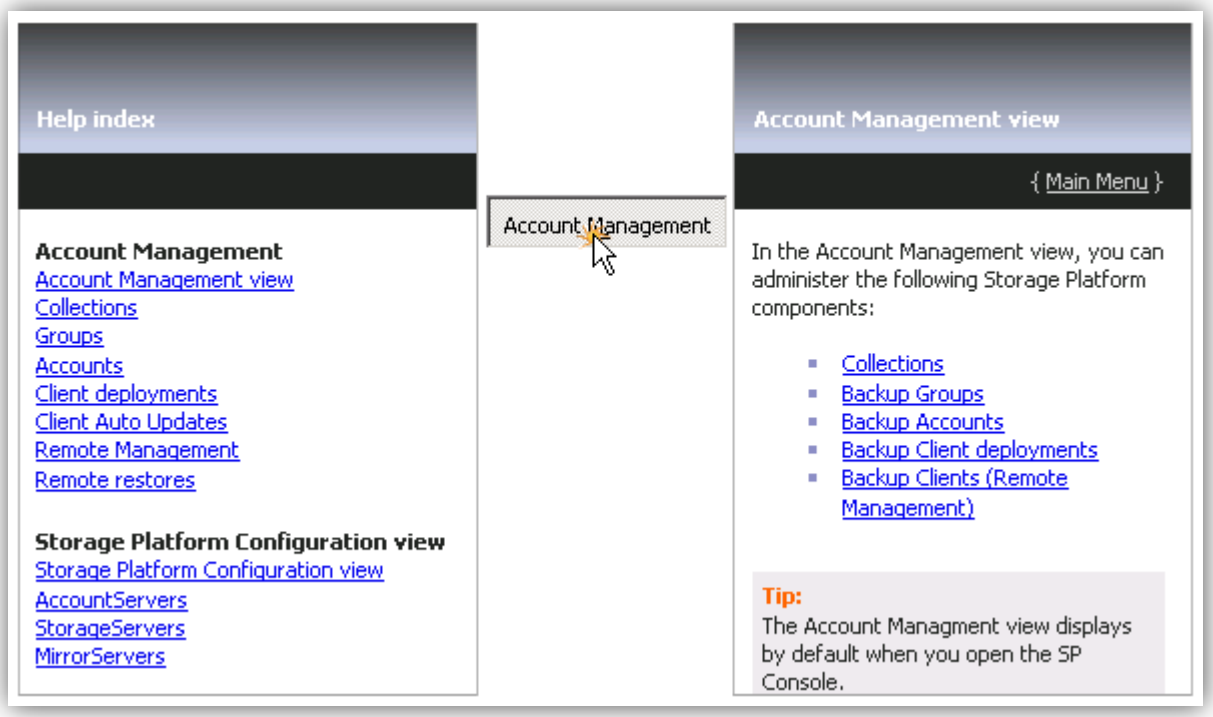
This area displays information relevant to the selected view. For more information on each view, see “View selector” earlier in this chapter.



The work area can be configured to display more

Product Help

Access the SP Console Help by clicking **Product Help** on the **Help** menu.



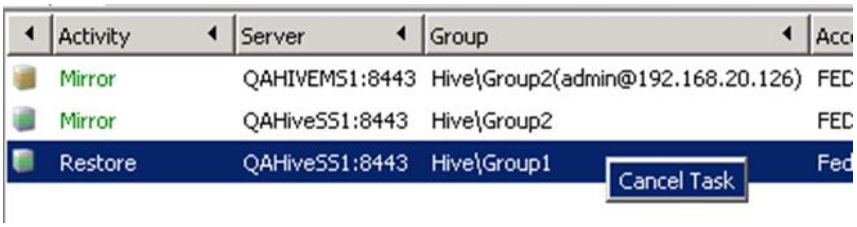
This Help pane displays information relating to the view open in the Console.

Activity area

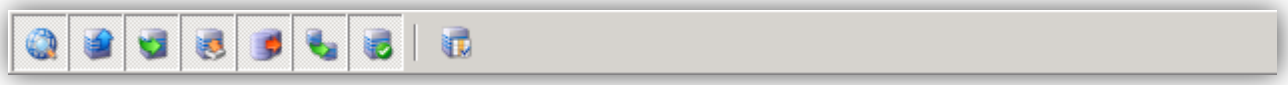
The Activity area displays information relating to all current connections and activities on the Storage Platform.

Information displayed:

- **Backups** (displayed in **Blue**)
- **Restores** (displayed in **Fuchsia**)
- **Roll-ups** (displayed in **Teal**)
- **Mirrors** (displayed in **Green**)
- **Account Moves** (displayed in **Purple**)
- **Integrity Checks** (displayed in **Red**)



Activity-related buttons are available on a small Activity toolbar:



Tips:

- *You can click the **Show All** button if all activities are not displayed.*
- *Columns can be sorted by clicking on the column headers.*
- *You can filter activities to only display a particular Backup Group(s) - Use the **Filter by Group** button on the toolbar (see below).*
- *While a process is being performed, a progress bar displays. You can right-click the progress bar and then click **Cancel** to stop the process.*

You can view/hide information by selecting or deselecting the following Activity buttons:

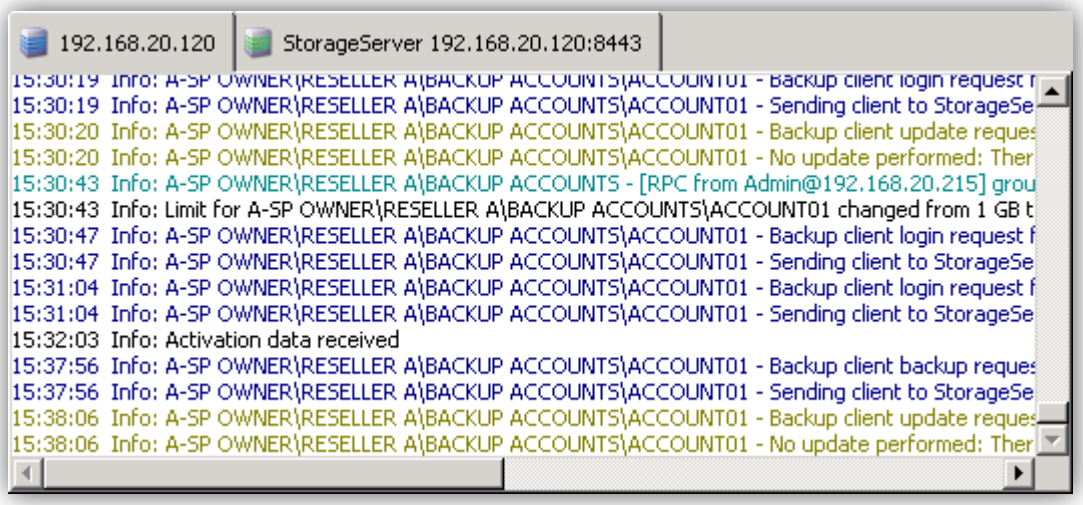
Activity Area Toolbar Button	Description
	Show all activities.
	Show Backup activity.
	Show Restore activity.
	Show Roll-up activity.
	Show Mirroring activity.
	Show Account move activity.
	Show Integrity Check activity.

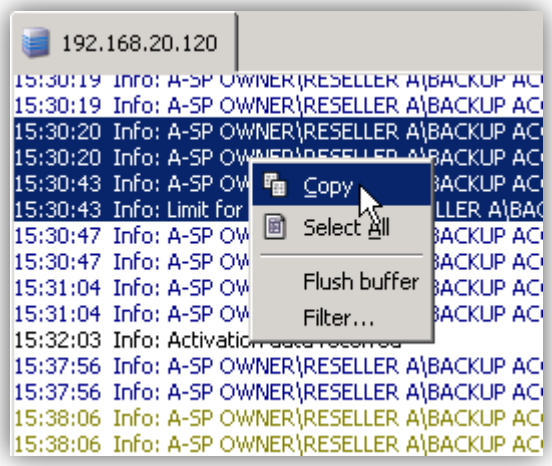
You can also modify the Activity display.

Activity Area Toolbar Button	Description
	Click this button to access the **Customize columns** dialog box, which enables you to display/hide columns in the Activity area.

Diagnostics area

The Diagnostics area displays the raw output supplied by the AccountServer and/or StorageServer(s) in a separate tab for each server.

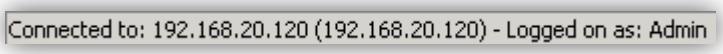

192.168.20.120
StorageServer 192.168.20.120:8443
15:30:19 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - Sending client to StorageSe
15:30:20 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - Backup client update reques
15:30:20 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - No update performed: Ther
15:30:43 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS - [RPC from Admin@192.168.20.215] grou
15:30:43 Info: Limit for A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 changed from 1 GB t
15:30:47 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - Backup client login request f
15:30:47 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - Sending client to StorageSe
15:31:04 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - Backup client login request f
15:31:04 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - Sending client to StorageSe
15:32:03 Info: Activation data received
15:37:56 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - Backup client backup reques
15:37:56 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - Sending client to StorageSe
15:38:06 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - Backup client update reques
15:38:06 Info: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS\ACCOUNT01 - No update performed: Ther



If you right-click within the **Diagnostics** output window, you can **Copy** the information (which is useful if you wish to email the output to a support engineer), use the **Flush buffer** to clear the current output window or use the **Filter** option to filter or highlight a particular word or phrase.

Status bar

The Status bar displays the IP address of the Storage Platform you are currently connected to, along with the username used to connect to it.



Chapter 6: Account Management

You can use the SP Console to manage Backup Accounts and their connections to the Storage Platform. You can also place the Accounts into Backup Groups and Collections and deploy Client installation files to enable the creation of new Accounts within those Groups and Collections. See below for more information.

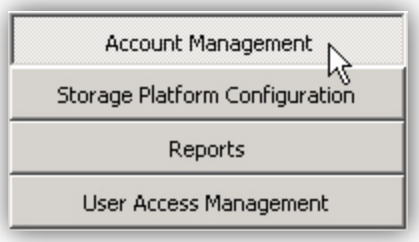
Account Management view

In the Account Management view, you can administer the following:

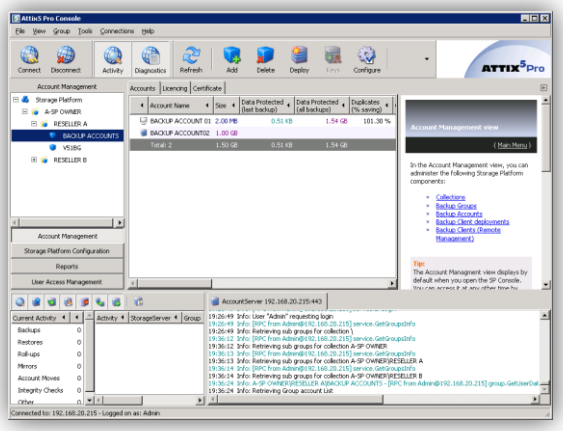
- **Collections**
- **Backup Groups**
- **Backup Accounts**
- **Backup Client deployments**
- **Backup Clients (Remote Management)**

To access the Account Management view:

1. Open the SP Console and connect to the Storage Platform. [See Chapter 3, "Connection".]
2. In the view selector on the left of the SP Console, click the **Account Management** button.



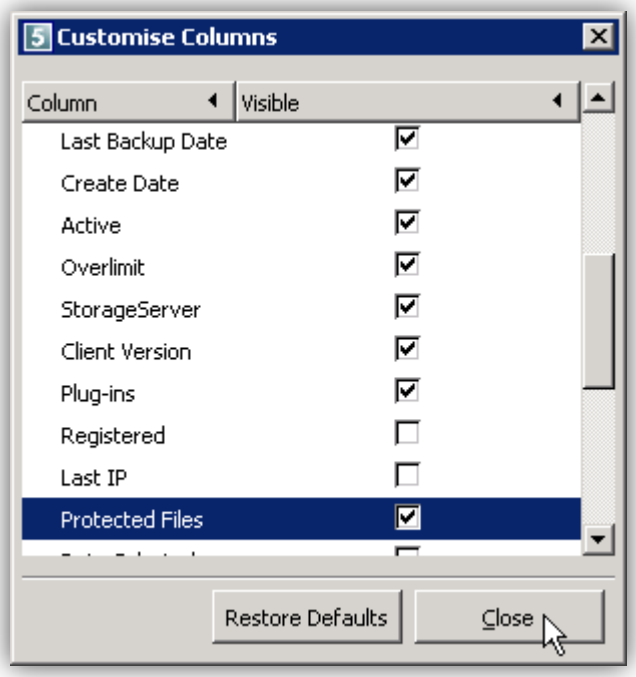
A summary of all Collections and Backup Groups configured on the Storage Platform will be displayed by default. This provides you with an overview of the default settings configured in each Collection/Backup Group.



When viewing this Backup Group summary, you can adjust the way that the information displays by adding/removing columns and filtering Backup Groups according to the licences they possess.

To add/remove columns:

1. On the **View** menu, click **Customize Columns**. Alternatively, click the **Customize Columns** button on the main toolbar.
2. In the **Customize Columns** dialog box that appears, specify which columns you wish to add/remove by selecting/clearing the check boxes next to the column names.
3. Click **Close**.



*Note: You can click the **Restore Defaults** button to revert to the default column selections.*

Note: The columns available depend on whether a Collection or Backup Group is selected.

When a Collection is selected, the following columns are available by default in the Groups tab:

- **Group Name** – The name of the Backup Group.
- **Group Limit** – The storage space allocated to the Backup Group.
- **Max Accounts** – The maximum number of Backup Accounts the Backup Group can hold. If this is zero, the number of Backup Accounts is unlimited.
- **Roll-ups** – The number of roll-ups that are retained for Accounts in the Backup Group.
- **Expiry Date** – The date on which the Backup Group expires. If this column is empty, the Backup Group does not have an expiry date.
- **Mirror Enabled** – Mirroring is either enabled or disabled.
- **Enabled** – The Backup Group is either enabled or disabled.
- **Type** – The Backup Group is either a registered or evaluation group.
- **Updates** – Automatic updates are either on, off or on the SP default setting.
- **Profiling** – Profiling is either enabled or disabled.
- **HSM Enabled** – Hierarchical Storage Management is either enabled or disabled.

- **Default Account Size** – The default storage space allocated to Backup Accounts in the Backup Group.
- **Overspill (%)** – The percentage of the Account limit that Accounts in the Backup Group may exceed during the backup process.

When a Backup Group is selected, the following columns are available by default in the Accounts tab:

- **Account Name** – The name of the Backup Account.
- **Size** – The storage space allocated to the Backup Account.
- **Data Protected (last backup)** – The amount of uncompressed data protected by the last backup.
- **Data Protected (all backups)** – The amount of data protected by all backups. The sum of the uncompressed size of all the files (excluding unchanged files) in all backups. If there are multiple copies of the same file, they will all contribute to the final size. If a file is patched, the new uncompressed file size (resulting size) is used.
- **Saving** – Saving due to compression, patching, and Account-level de-duplication. It is the difference between Data Protected (all backups) and On Disk.
- **Saving %** – Saving as a percentage of Data Protected (all backups), i.e. Saving / Data Protected (all backups) * 100.
- **On Disk** – The amount of disk space used to store all backups on the StorageServer (excluding index files). This is generally less than the Data Protected columns due to compression, patching and SIS.
- **Account Usage** – The percentage of the Backup Account being used.
- **Backups & Roll-ups** – The number of backups and roll-ups that are available to restore from.
- **Last Backup** – The date and time at which the last backup started.
- **Create Date** – The date on which the Account was created.
- **Active** – The Backup Account is either active or disabled.
- **Overlimit** – The amount of data that the Backup Client attempted to back up. If the amount of data is within the allowed overspill, the backup will be successful; otherwise it will fail.
- **StorageServer** – The IP address of the StorageServer to which the Account backs up.
- **Client Version** – The version of the Backup Client associated with the Account.
- **Plug-ins** – Lists the plug-ins installed on the Backup Client. Depending on the settings, the plug-ins will either appear as a list with each plug-in on a separate line or in a drop-down list on a single line. If the column contains "...", select the Account and then click on the Plug-ins column to view the drop-down list.
- **GUID** – The Globally Unique Identifier of the Account.
- **StorageServer IP Override** – If true, the Account is temporarily being directed to a different StorageServer (the IP of which is shown in the StorageServer column) from its usual one.

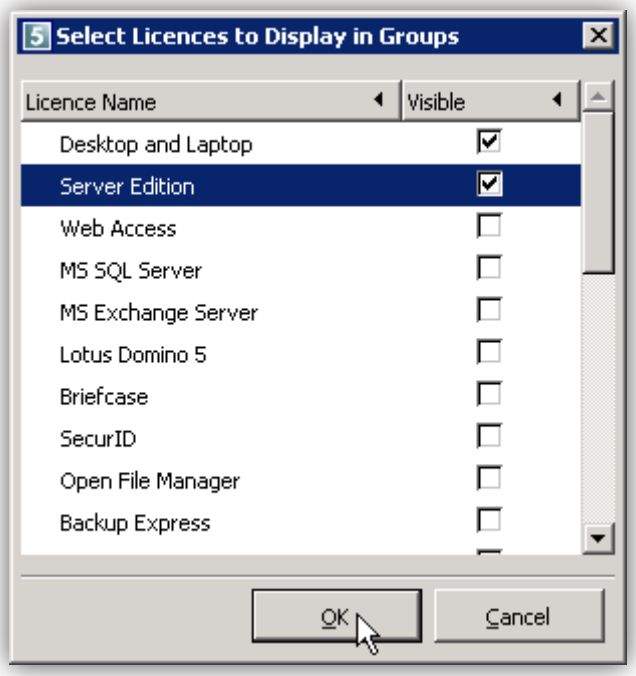
- **Restorable Data** – Restoring a full, uncompressed copy of each backup and adding up the size of all the data restored will result in this figure.

To filter Groups according to licences:

1. On the **View** menu, click **Filter Accounts**. Alternatively, click the **Filter** button on the main toolbar.

   *Note: This option is only available when viewing a Backup Group's **Accounts** tab. Click the Backup Group name in the Account Management tree and then ensure that the **Accounts** tab is selected in the work area (right-hand pane).*

2. In the **Select Licences to Display in Groups** dialog box that appears, all licences are selected by default. Clear all check boxes except those belonging to the licences you wish to filter by.
3. Click **OK**.



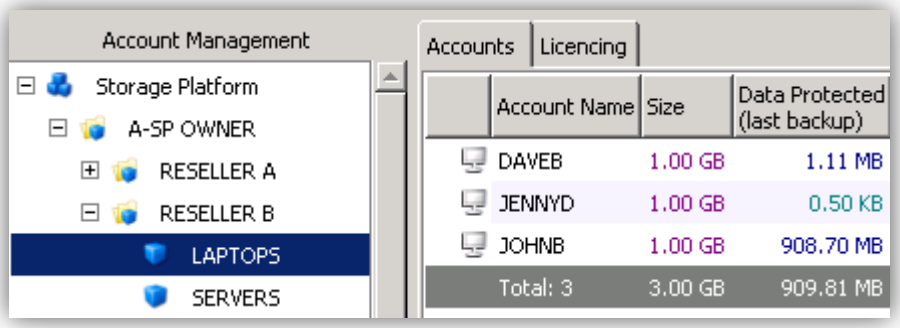
Account Management view icon legend		
Icon	**Location**	**Description**
	Account Management tree	Storage Platform Collection (top level)
	Account Management tree	Collection
	Account Management tree	Group
	Account Management tree	Disabled Group
	Accounts tab	Server Edition Backup Client Account
	Accounts tab	Desktop & Laptop Edition Backup Client Account

For more information on configuring Backup Groups, see “Backup Groups” later in this chapter.

Collections

In the Account Management tree, you can create a Collection and then move or add Backup Groups to it. This is especially useful to administrators managing multiple Backup Groups that can be categorised.

Example: *A Collection can be used to manage Groups representing different categories of Backup Accounts (e.g. departments, teams, resellers, Backup Account types):*



You can perform the following actions on Collections using the SP Console:

- **Add/Delete Collections**
- **Configure Collection settings**
- **Add/Delete/Configure Groups** (See *Adding and deleting Groups* later in this chapter.)

Adding and deleting Collections

To add a Collection:

1. In the Account Management view, expand the Account Management tree and select the node you wish to add the Collection to.
2. On the **Storage Platform** or **Collection** menu, click **Add Group or Collection**. Alternatively, click the **Add** button on the main toolbar or right-click the node and then click **Add Group or Collection** in the shortcut menu that appears.

   *Note: You can add a Collection to the **Storage Platform** Collection or to any other Collection but you cannot add a Collection to a Group.*

3. In the **Add New Group or Collection** dialog box that appears, select **Collection**.
4. In the **Name** box, type a display name for the Collection.

   Note: The following characters are not supported in Collection names: "", "/", "\", "|", "<", ">", "?", ":", "_", "&", "#", "@" and "!".*

5. In the **Storage Limit** box, enter storage limit for the Collection.

   Note: This storage limit will affect the storage limits available to all Backup Groups and Collections added to this Collection. Also, setting this value to "0" will enable it to use the maximum storage available in its parent Collection. E.g. If the Collection belongs to the main StorageServer Collection and it has a storage limit of 50 GB, if the StorageServer Collection has other Collections or Groups and their limits add up to 40 GB, setting this Collection's storage limit to 0, will enable it to store up to 10 GB of data. If, however, another Backup Group or Collection is added to the StorageServer Collection, the limit assigned to that Group or Collection will affect the storage space available to this Collection. For example, if the new Group is assigned a 5 GB limit, this Collection will then only be able to store up to 5 GB of data.

6. Click **OK**.

Note: After creating a Collection, you need to make licences available to any Backup Groups you may wish to add to it. To do this, you'll need to assign licences to the Collection. The Console will prompt you to do this after creating the Collection. For instructions, see "Account Management Licencing" later in this chapter.

To delete a Collection:

1. In the Account Management tree, click the Collection name.
2. On the **Collection** menu, click **Delete Collection**. Alternatively, click the **Delete** button on the main toolbar or right-click the Collection name and then click **Delete Collection** on the shortcut menu that appears.
3. In the confirmation dialog box that appears, click **Yes**.

Configuring Collection settings

Settings configured for a Collection will determine the default settings assigned to all new Backup Groups added to that Collection.

Note: While most Collection settings affect only the default values of new Backup Groups, the Group Storage Limit applies to the sum of all Backup Group limits within the Collection. Please ensure that the Collection's limit accommodates the limits applied to all the Backup Groups it will contain.

To configure Collection settings:

1. In the Account Management view, expand the Account Management tree and then select the Collection name.
2. On the **Collection** menu, click **Configure**. Alternatively, click the **Configure** button on the toolbar or right-click the Collection name and then click **Configure** on the shortcut menu that appears.
3. In the **Configure Collection** dialog box that appears, configure the options as required, and then click **OK**.

Note: All configuration options available for Backup Groups are available for Collections.

Tip: For more information on Backup Group configuration options, see "Configure Group dialog box" later in this chapter.

Backup Groups

Every Backup Account needs to belong to a Backup Group in the SP Console. You can add, delete, configure or move Backup Groups as required.

The SP Console enables you to perform the following Backup Group actions:

- **Add/Delete Groups**
- **Manage banner adverts**
- **Configure Group settings**
- **Move Groups**
- **Create Backup Client deployments for Groups**
- **Work with Group certificates**
- **Add/Remove Group licences**
- **Access often-used reports**

Adding and deleting Groups

Notes:

- *You can add a Backup Group to the **Storage Platform** Collection (the root Collection) or to any other Collection but you cannot add a Backup Group to another Group.*
- *Backup Groups added directly to the **Storage Platform** Collection can be configured individually.*
- *Backup Groups added to any other Collection will inherit the licencing, limits and user rights of that Collection.*

To add a Group:

1. In the Account Management view, expand the Account Management tree and select a Collection name.
2. On the **Collection** menu, click **Add Group or Collection**. Alternatively, click the **Add** button on the main toolbar or right-click the Collection name and then click **Add Group or Collection** on the shortcut menu.
3. In the **Add New Group or Collection** dialog box that appears, select **Backup Group.**
4. Type a display name for the Group in the **Name** box.

   Note: The following characters are not supported in Backup Group names: "", "/", "\", "|", "<", ">", "?", ":", "_", "&", "#", "@" and "!".*

5. In the **Storage Limit** box, enter a storage limit for the Group.

   Note: If you type "0" in this box, the Group will be allowed to use the maximum storage available in the parent Collection. E.g. If the Group belongs to the main StorageServer Collection and it has a storage limit of 50 GB, if it already has another Group with a Storage limit of 40 GB, setting this Group's storage limit to 0, will enable it to store up to 10 GB of data. If, however, another Backup Group is added to the StorageServer Collection, the limit assigned to that Group will affect the storage space available to this one. For example, if the new Group is assigned a 5 GB limit, this Group will then only be able to store up to 5 GB of data.

6. Type a create key (16 characters or less) in the **Create Key** box. For more information on Create Keys, see "Account Create Key" later in this chapter.
7. Specify the default maximum Account size limit in the **Default Account Size** box.
8. Click **OK**.

Note: After creating a Group, you need to make licences available for any Backup Accounts that try to back up to it. To do this, you'll need to assign licences to the Group. For instructions, see "Account Management Licencing" later in this chapter.

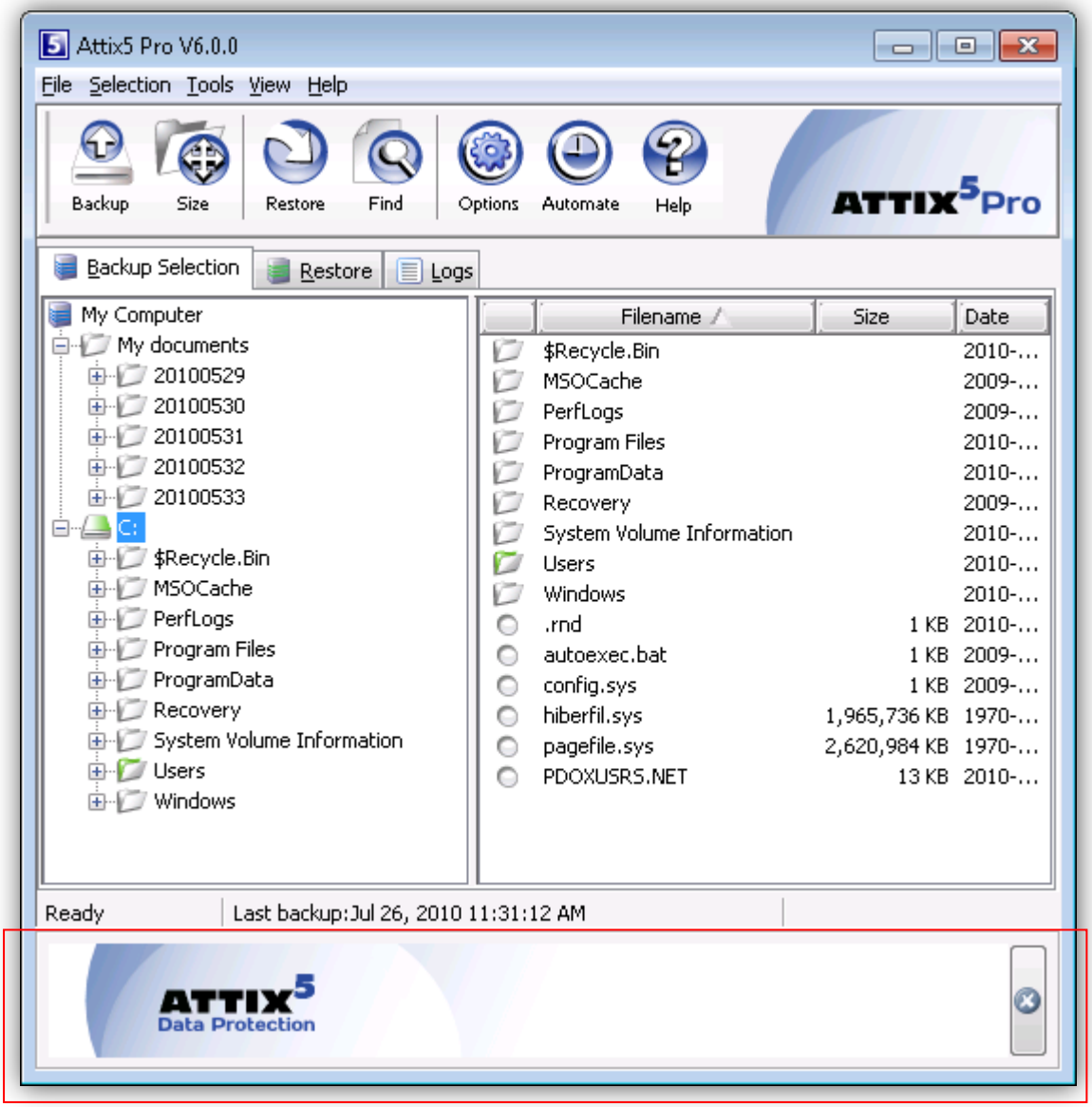
To delete a Group:

1. In the Account Management view, expand the Account Management tree and select the Group name.
2. On the **Group** menu, click **Delete Group**. Alternatively, click the **Delete** button on the main toolbar or right-click the Backup Group name and then click **Delete Group** on the shortcut menu.
3. In the confirmation dialog box that appears, click **Yes**.

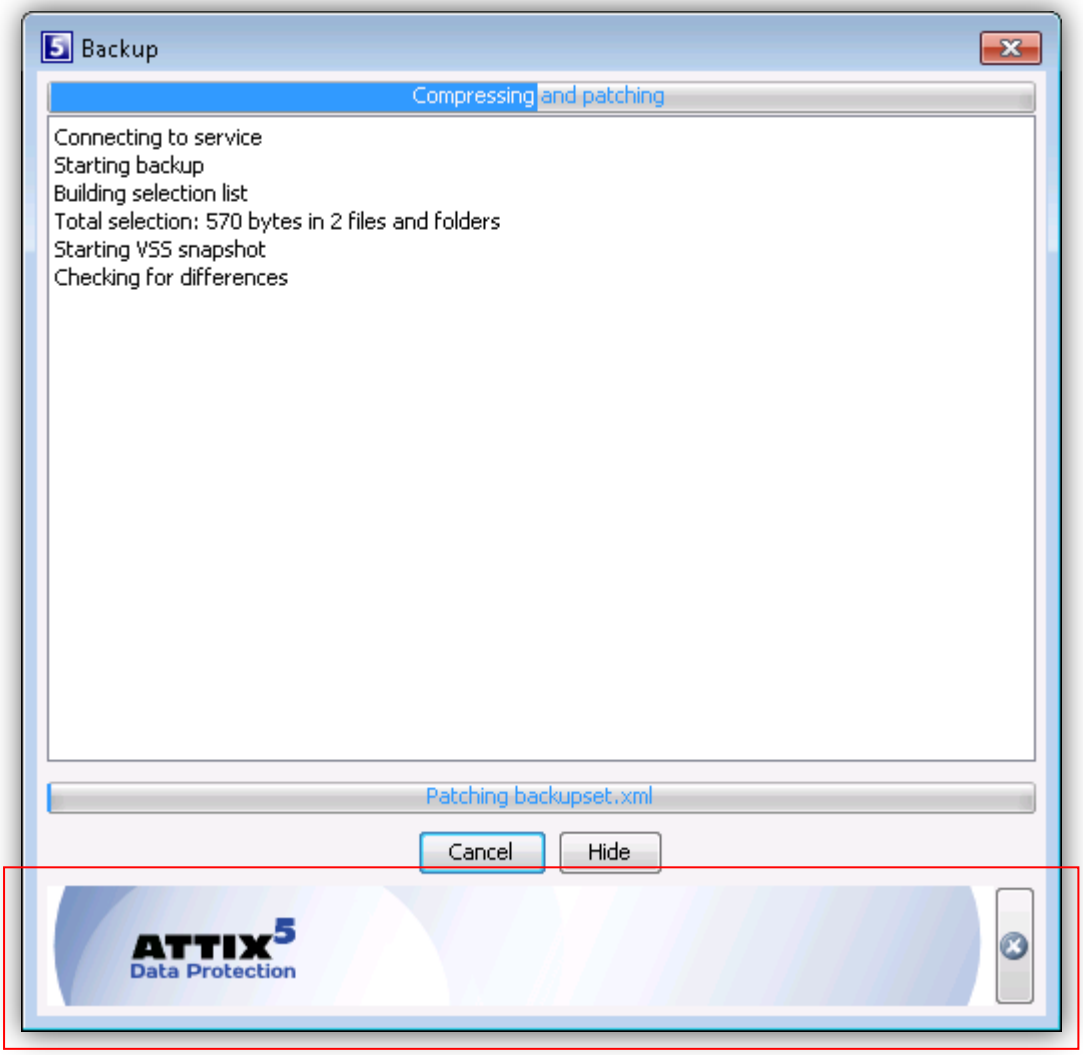
Warning: *You cannot delete a Group that still contains Backup Accounts. If you try to do so, you will receive a Warning message indicating that you need to delete all Accounts within the Group first.*

Managing the banner advert

By default, a banner advertisement displays at the bottom of each Desktop & Laptop Client application when it is first opened. Depending on whether the Client's Backup Account is a Registered or Evaluation Account, the user may or may not be able to close the advert. For more information, see the *Expiry tab* section of *Backup Groups* in Chapter 6, "Account Management".



The same banner advertisement displays in the **Backup** dialog box after every backup by default.



Note: This feature may be disabled for Registered Accounts belonging to Registered Backup Groups.

To enable the banner advert:

1. In Account Management view, expand the Account Management tree and then select the relevant Backup Group.
2. On the **Group** menu, click **Configure**. Alternatively, click the **Configure** button on the toolbar or right-click the Backup Group name, and then select **Configure** on the shortcut menu that appears.
3. In the **Configure Group** dialog box that appears, click the **Expiry** tab.
4. Select the **Enable Client Banner** check box.
5. If you wish to use the Storage Platform's default banner, ensure that "Default" is specified in the **Client Banner URL** box, click the **Test URL** button to verify that the image displays correctly, and then click **OK**.

Notes:

- *Please note that your new banner image needs to be exactly 468px wide and 60px high. Deviation from these dimensions will result in the image being distorted.*
- *Images may be in JPG, PNG or GIF format.*

Tip: You can change the banner image used by typing a new URL in the **Client Banner URL** *box, and then clicking* **OK**. *Ensure that the new URL points to an HTML file with the banner image embedded in it. For a detailed example, see* Defaults tab *under* Configuring an AccountServer *in Chapter 7, "Storage Platform Configuration".*

To disable the banner advert:

In Account Management view, expand the Account Management tree and then select the relevant Backup Group.

Notes:

- *You can only disable the banner advert on Registered Groups.*
- *When disabling the banner for a Registered Group, it will only affect Registered Backup Accounts. Any Evaluation Accounts in the Group will display either the last banner advert it obtained from the Storage Platform at the end of its last backup or, if no backup has been performed yet, it will use the default banner specified for the Storage Platform. For more information on default banner settings, see* Defaults tab *in Chapter 6, "Storage Platform Configuration".*
- *It is recommended that you move all Registered Backup Accounts to Registered Backup Groups and Evaluation Backup Accounts to Evaluation Backup Groups.*

To change the *default* banner for all Accounts on the Storage Platform:

1. Upload your new banner image to a web server, create an HTML file with the banner image embedded in it and make a note of its URL. For a detailed example, see *Defaults tab* under *Configuring an AccountServer* in Chapter 7, "Storage Platform Configuration".

   Notes:
   - *Please note that your new banner image needs to be exactly 468px wide and 60px high. Deviation from these dimensions will result in the image being distorted.*
   - *Images may be in JPG, PNG or GIF format.*

2. In the Storage Platform Configuration view, select the AccountServer node.
3. On the **AccountServer** menu, click **Configure**. Alternatively, click the **Configure** button on the toolbar or right-click the AccountServer node, and then click **Configure** on the shortcut menu that appears.
4. In the **Configure AccountServer** dialog box that appears, ensure that the **Defaults** tab is selected.
5. In the **Default client banner URL** box, replace the default URL with your new banner's URL.
6. Click the **Test URL** button to test the path.
7. Click **OK**.

Note: *The URL will now be the default URL for all Backup Accounts on the Storage Platform belonging to Groups that are configured to use the Storage Platform's default Client Banner URL (see* Expiry tab *under* Configure Group dialog box *in Chapter 6, "Account Management".). You can specify that Backup Accounts belonging to a particular Backup Group use a different banner image by following the instructions below.*

To change the banner for all Backup Accounts *belonging to a particular Backup Group*:

1. Upload your new banner image to a web server, create an HTML file with the banner image embedded in it and make a note of its URL. For a detailed example, see *Defaults tab* under *Configuring an AccountServer* in Chapter 7, "Storage Platform Configuration".

   Notes:
   - *Please note that your new banner image needs to be exactly 468px wide and 60px high. Deviation from these dimensions will result in the image being distorted.*
   - *Images may be in JPG, PNG or GIF format.*

2. In Account Management view, expand the Account Management tree and then select the relevant Backup Group.
3. On the **Group** menu, click **Configure**. Alternatively, click the **Configure** button on the toolbar or right-click the Backup Group name, and then select **Configure** on the shortcut menu that appears.
4. In the **Configure Group** dialog box that appears, click the **Expiry** tab.
5. If the Group is registered, ensure that the **Enable Client Banner** check box is selected, type your new URL in the **Client Banner URL** box, and then click the **Test URL** button to test the path.

   Notes:
   - *The defined URL will replace the default banner URL permanently on the Backup Client. Please note that this applies to both Registered and Evaluation Groups.*
   - *If Enable Client Banner is selected but you leave the Client Banner URL box empty, the last banner URL specified for the Group will display in the Client.*

6. If the Group is an Evaluation Group, **This is an evaluation Group** should be selected. Beneath the Evaluation Group settings, in the **Client Banner URL** box, type the new banner URL, and then click the **Test URL** button to test the new path.

   Notes:
   - *When configuring banner settings for an Evaluation Group, the settings will only apply to Evaluation Backup Accounts. Any Registered Accounts in the Group will be unaffected.*
   - *The defined URL will replace the default banner URL permanently on the Backup Client. Please note that this applies to both Registered and Evaluation Groups.*

7. A browser window should open, displaying the new banner. If it displays correctly, click **OK**.

For more information on configuring the **Expiry** tab, see *Configure Group dialog box* later in this chapter.

To configure all Backup Accounts *belonging to a particular Backup Group* to display the *default* banner:

1. In Account Management view, expand the Account Management tree and then select the relevant Backup Group.
2. On the **Group** menu, click **Configure**. Alternatively, click the **Configure** button on the toolbar or right-click the Backup Group name, and then select **Configure** on the shortcut menu that appears.
3. In the **Configure Group** dialog box that appears, click the **Expiry** tab.
4. Delete the URL in the relevant **Client Banner URL** box, and then type "`Default`".
5. Click the **Test URL** button to test the URL.
6. If the banner displays in a browser window as expected, click **OK**.

> ***Note:*** *The default banner is specified at the AccountServer level. See: "*To change the *default* banner for all Accounts on the Storage Platform*" earlier in this chapter.*

To revert to the original banner supplied by your software provider:

1. If the original banner image was replaced at any point and is no longer available on the Backup Client machines or the AccountServer, you need to obtain a copy of the image from your service provider, upload it to your web server, create an HTML file with the banner image embedded in it and make a note of its URL. For a detailed example, see *Defaults tab* under *Configuring an AccountServer* in Chapter 7, "Storage Platform Configuration".
2. Change the relevant Client Banner URL to point to the updated HTML file.

> ***Notes:***
> - *To replace the Default client banner URL in the AccountServer configuration settings, see "*To change the *default* banner for all Accounts on the Storage Platform*" earlier in this chapter. This will affect all Backup Accounts using the default banner configuration.*
> - *To replace a particular Backup Group's Client Banner URL, see "*To change the banner for all Backup Accounts belonging to a particular Backup Group*" earlier in this chapter. Only Backup Accounts belonging to that Group will be affected.*

Each Backup Client will download the original banner at the end of its next backup.

Configuring Group settings

You can use the **Configure Group** dialog box to perform most Backup Group configuration tasks.

To access the Configure Group dialog box:

1. In the Account Management view, expand the Account Management tree and select the Group name.
2. On the **Group** menu, click **Configure**. Alternatively, click the **Configure** button on the main toolbar or right-click the Group name and then click **Configure** on the shortcut menu that appears.

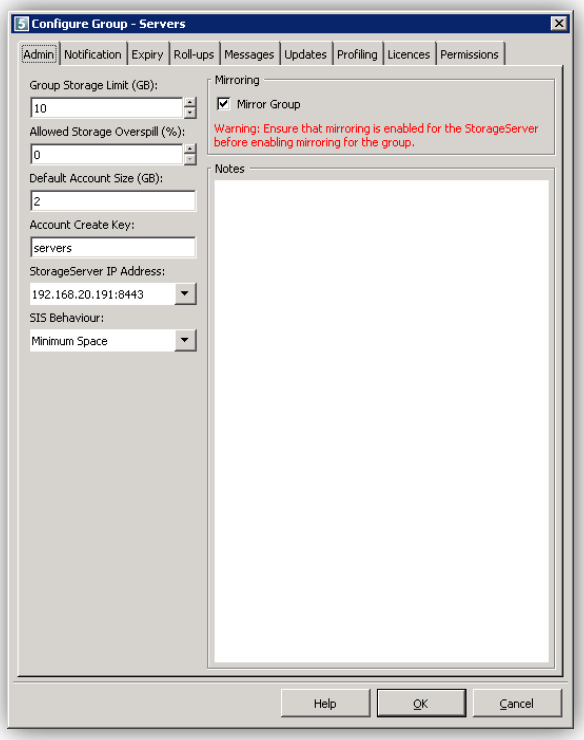
Below are descriptions of the tabs and options available in the **Configure Group** dialog box.

Configure Group dialog box

Admin tab

Group Storage Limit (GB)

The Group Storage Limit is the total amount in GB that can be allocated to Backup Accounts in this Group.



Warning: *You will not be able to add users when this limit has been reached.*

Allowed Storage Overspill (%)

This setting enables you to specify a percentage of the Backup Account limit that Accounts in the Group may exceed during the backup process. This ensures that the backup is completed successfully, even if the backup selection is too large. Backup Accounts exceeding the Account limit will be flagged and you can enable Over Limit Notification to inform the user in the Backup log. You can also specify that Over Limit Notifications be emailed to the Backup Administrator. For more information, see "Notification tab" later in this chapter.

Default Account Size (GB)

Use this box to specify the default Backup Account size limit for all new Backup Accounts.

Account Create Key

This key is needed to create new Backup Accounts for this Backup Group. It is used during the Backup Client software Deployment process and prevents unauthorised Backup Accounts being created.

Notes:

- *A Create Key can be up to 16 characters long and consist of letters, numbers and characters.*
- *Create Keys are not case-sensitive.*

StorageServer IP Address

If multiple StorageServers are available, you can click the **StorageServer IP Address** arrow and select an IP address to ensure that all Backup Accounts in the Group reside on the same StorageServer.

Note: Automatic StorageServer IP address allocation is enabled by default. This means that when a new Backup Account is created, it will be assigned to the StorageServer with the most free disk space.

SIS Behaviour

*Note: SIS behaviour settings only refer to **Global SIS**; Account-level SIS is always enabled (equivalent to **Minimum Space** setting).*

Disabled – Global SIS is completely disabled for all Backup Accounts in the Group. You will not benefit from files already on the StorageServer and none of the uploaded files will be placed in Global Storage. This has the least impact on the disk during backups and is also the fastest.

Minimum Space (Default) – During the backup, all received files are checked against Global Storage to eliminate duplicates prior to transfer. This requires that Global Storage is accessed during the backup process which will slow the *validating* and *optimizing* part of the backup down but will ensure the smallest transfer.

Max Speed – When selected, the backup will always send all intended files to the Storage Platform, whether they exist in Global Storage or not. After the backup, any duplicates will, however, be filtered out in a separate process (not holding up backups), fully utilizing Global Storage. This setting should be used in a high bandwidth environment (e.g. LAN) where transfer savings are not important as more data may be transmitted than is absolutely necessary.

Mirroring

Mirroring is enabled by default. If you wish to exclude this Group from being mirrored, clear the **Mirror Group** check box.

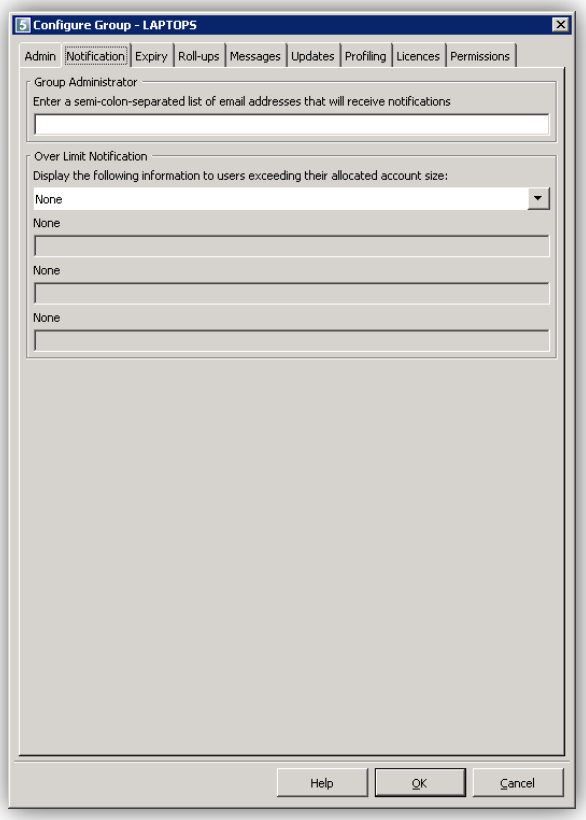
Warning: *Ensure that mirroring is enabled for the StorageServer before you enable mirroring for the Backup Group. For more information, see* Managing Mirroring *in Chapter 6, "Storage Platform Configuration".*

Notes

You can use this area to add the contact details of everyone involved in managing this Backup Group. For example, the Account Manager, default technical contact, etc.

Notification tab

Group Administrator



The list of users you specify in this area will receive an email notification whenever information related to this Backup Group is available. For example, when a Backup Account is utilising the Allowed Storage Overspill functionality, all users listed in the **Enter a semi-colon...** box will receive an Over Limit email. This will help ensure that the administrator(s) either upgrade the Account limit, or reduce the size of the backup selection.

Over Limit Notification

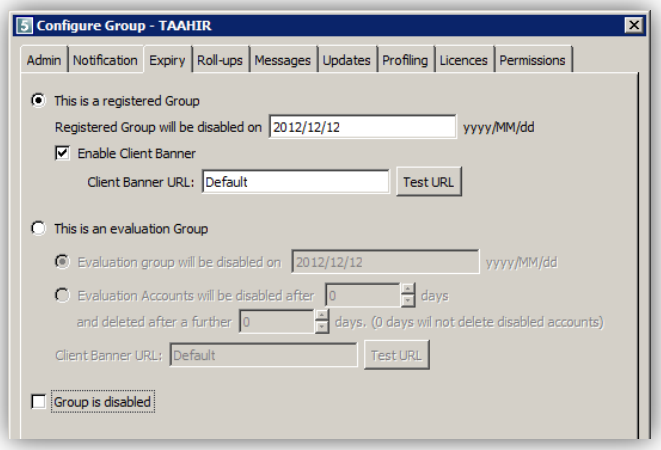
When a Backup Account exceeds its Account size limit, a message is displayed in the Backup Client to notify the user. In addition to the notification, the message can be set to display one of the following for Backup Account upgrade enquiries:

- **None** – No additional information is displayed.
- **Telephone** – A name and telephone number are displayed.
- **Email** – A name and email address are displayed.
- **Telephone and Email** – A name, telephone number and email address are displayed.
- **Website** – A URL is displayed.

Supply the relevant information for the chosen option, if applicable.

Expiry tab

Use this tab to specify whether the Backup Group is registered or being used for evaluation purposes. You can also specify when this Group must be disabled, after which Accounts belonging to it will not be able to connect to the Storage Platform.



> ***Note:*** *Instead of disabling the entire Group on a certain date, individual evaluation accounts can automatically be disabled and deleted after a specified number of days.*

Select **This is a registered group** once users have obtained a Group licence. Should the Group's registration be for a limited time period, you can specify the date on which the Group will be disabled in this area. You can also enable or disable the display of a Client banner at the bottom of Clients belonging to Registered Groups. Clear the **Enable Client Banner** check box to disable the banner display.

Select **This is an evaluation group** to allow users to evaluate the software for a limited period. Users backing up to an evaluation group or with evaluation accounts will see a countdown to the expiry date in their backup summary screen, displayed after each successful backup (e.g. "Your evaluation account will expire in 6 days").

> ***Note:*** *The Client banner image in the defined URL will replace the default banner image permanently on the Backup Client. Please note that this applies to both registered and Evaluation Groups.*

Users in an evaluation group will always see a Client banner displayed with each backup, as specified in the **Client Banner URL** box. "Default" displays the default banner as configured on the AccountServer's **Defaults** tab. (See *Defaults tab* in Chapter 6, "Storage Platform Configuration".) This banner can contain product features or information on how to upgrade an Account.

The banner URL should point to an HTML file with the following format:

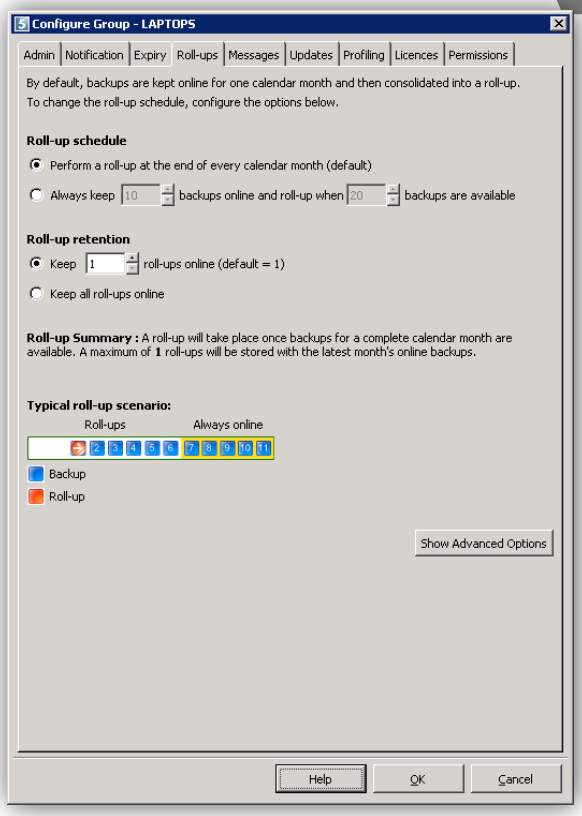
```
<HTML>
<CENTER><A HREF="http://link here"><IMG SRC="Image here" BORDER=0 WIDTH=468
HEIGHT=60></A></CENTER>
</HTML>
```

You can also disable a particular Backup Group manually by selecting the **Group is disabled** check box.

Warning: *Backup Accounts belonging to a disabled Backup Group will not be deleted but users will not be able to connect to the Storage Platform.*

Roll-ups tab

By default, backups from the current calendar month to those performed at the beginning of the last calendar month are always kept online. Backups older than that are rolled up at month-end and one roll-up is retained online. When a roll-up occurs at the end of a month, a full backup copy of the last successful backup in that month is created by working through all the backups and patches for that month. This enables you to restore files from the current month's backups, the previous month's backups and from the online roll-up of the month prior to that. This means that if a file was backed up on the 3rd day of the first month and then deleted on the 4th day of that same month, the file will not be selected for back up on the last day of the first month and will therefore not be included in the first month's roll-up.


Configure Group - LAPTOPS
Admin
Notification
Expiry
Roll-ups
Messages
Updates
Profiling
Licences
Permissions
By default, backups are kept online for one calendar month and then consolidated into a roll-up.
To change the roll-up schedule, configure the options below.
Roll-up schedule
Perform a roll-up at the end of every calendar month (default)
Always keep 10 backups online and roll-up when 20 backups are available
Roll-up retention
Keep 1 roll-ups online (default = 1)
Keep all roll-ups online
Roll-up Summary : A roll-up will take place once backups for a complete calendar month are available. A maximum of 1 roll-ups will be stored with the latest month's online backups.
Typical roll-up scenario:
Roll-ups
Always online
Backup
Roll-up
Show Advanced Options
Help
OK
Cancel

Note: *Roll-ups will only be done for Backup Accounts that have backed up within the last month. In cases where no backups have been performed for over a month, roll-ups will resume after the first successful backup.*

Warning: *If you have Multiple Backup Sets configured, please note that each backup performed by each set will affect the roll-up schedule.*

Example: *If you begin your backups during January, by the end of February, you can recover from any specific backup during January or February. When you do your first backup in March, all backups in January are consolidated into a roll-up. In March, you can access any backup made during March or February as well as any file/folder within the roll-up for January. With the default setting to keep only 1 roll-up, when you do your first backup in April, the backups for February are consolidated into a roll-up and the roll-up for January is deleted.*

Roll-up schedule

You can change the roll-up schedule in this area. **Perform a roll-up at the end of every calendar month** is selected by default but you can specify a different schedule to suit your needs.

To change the roll-up schedule:

1. Select **Always keep...**
2. Type the number of backups to keep online in the **Always keep** box.
3. Type the number of backups that should first be available before a roll-up is initiated in the **roll-up when** box.
4. Ensure that the roll-up retention value is set correctly (see below).
5. Click **OK**.

Warning: *If you set the* ***Always keep x backups online...*** *value to 0, after a roll-up occurs, no online backups will be left on the SP. Therefore, when the first backup after a roll-up occurs, there will not be an index file to patch against and a warning indicating this will be displayed in the logs. A full index will then be requested.*

Roll-up retention

Use this area to specify the number of roll-ups to keep online.

Example: *With the default setting to keep only 1 roll-up, when you do your first backup for the month, the backups for the previous month are consolidated into a roll-up and the roll-up for the month prior to that is deleted.*

Additional information

Depending on the data type, a certain amount of storage space is required to keep multiple Roll-ups online.

For flat file data, where the rate of change is low, all unchanged data will be shared across the various roll-ups.

Example 1:

User share data with 2% monthly change					
Roll-up	**Selected data (restorable)**	**Compressed size**	**Unchanged data**	**Changed data**	**Total disk usage**
1	10 TB	5 TB	10 TB	0 TB	5 TB
2	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
3	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
4	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
5	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
6	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
7	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
8	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
9	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
10	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
11	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
12	10 TB	0.1 TB	9.8 TB	0.2 TB	0.1 TB
Totals	**120 TB**	**6.1 TB**	**117.8 TB**	**2.2 TB**	**6.1 TB**

Example 2:

SQL data with 4% change					
Roll-up	**Selected data (restorable)**	**Compressed size**	**Unchanged data**	**Changed data**	**Total disk usage**
1	200 GB	50 GB	200 GB	0 GB	50 GB
2	200 GB	50 GB	192 GB	8 GB	50 GB
3	200 GB	50 GB	192 GB	8 GB	50 GB
4	200 GB	50 GB	192 GB	8 GB	50 GB
5	200 GB	50 GB	192 GB	8 GB	50 GB
6	200 GB	50 GB	192 GB	8 GB	50 GB
7	200 GB	50 GB	192 GB	8 GB	50 GB
8	200 GB	50 GB	192 GB	8 GB	50 GB
9	200 GB	50 GB	192 GB	8 GB	50 GB
10	200 GB	50 GB	192 GB	8 GB	50 GB
11	200 GB	50 GB	192 GB	8 GB	50 GB
12	200 GB	50 GB	192 GB	8 GB	50 GB
Totals	**2.4 TB**	**600 GB**	**2.312 TB**	**88 GB**	**600 GB**

To specify the number of roll-ups to keep online:

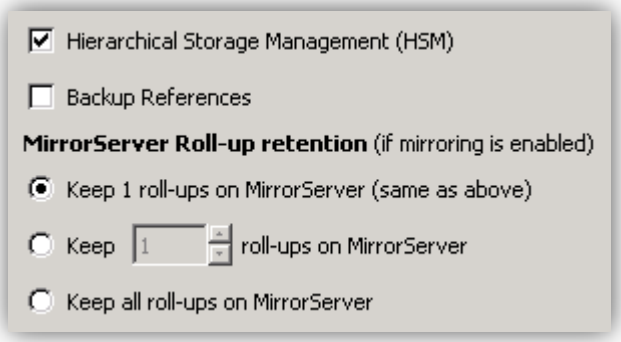
1. Ensure that **Keep *x* rollups online** is selected.
2. Type the number of roll-ups in the box provided.
3. Ensure that the roll-up schedule and retention values are correct by reviewing the **Roll-up Summary** that displays below the Roll-up retention area.
4. Click **OK**.

Warnings:

- *If you select **Keep all roll-ups online**, the Storage Platform will eventually run out of disk space.*
- *NEVER delete any files, including Roll-ups, from the Storage Platform's **StorageVolume** folders. The Storage Platform will automatically do maintenance on these folders when needed. Manually deleting files will lead to data loss.*

Advanced Options

By clicking the **Show Advanced Options** button, you can access the Hierarchical Storage Management (HSM), Backup References and MirrorServer roll-up retention options.


Hierarchical Storage Management (HSM)
Backup References
MirrorServer Roll-up retention (if mirroring is enabled)
Keep 1 roll-ups on MirrorServer (same as above)
Keep 1 roll-ups on MirrorServer
Keep all roll-ups on MirrorServer

HSM

Selecting **Hierarchical Storage Management (HSM)** will enable HSM for the Group. With HSM enabled, all Backup Accounts belonging to the Group will automatically archive roll-ups that are older than the latest roll-up kept online to the directory specified on the StorageServer's HSM tab.

Note: *To enable HSM at Group level, HSM must be enabled on the relevant StorageServer. For more information on enabling HSM on the StorageServer, see StorageServers in Chapter 7, "Storage Platform Configuration".*

Backup References

With **Backup References** enabled, you can view a list of backed up items that were archived from the Storage Platform to the specified HSM directory on the **Restore** tab. All archived folders are displayed with greyed-out folder icons and you can browse through the available backup dates.

Note: *These files can, however, not be restored until the data is moved back to the applicable folder on the Storage Platform by one of the Backup Administrators.*

MirrorServer Roll-up retention

As with StorageServers, you can specify the number of roll-ups to keep in the MirrorServer.

Messages tab

This tab enables you to specify a message to be displayed in Desktop & Laptop Clients' summary screens after each backup.

To add a message for display after each backup:

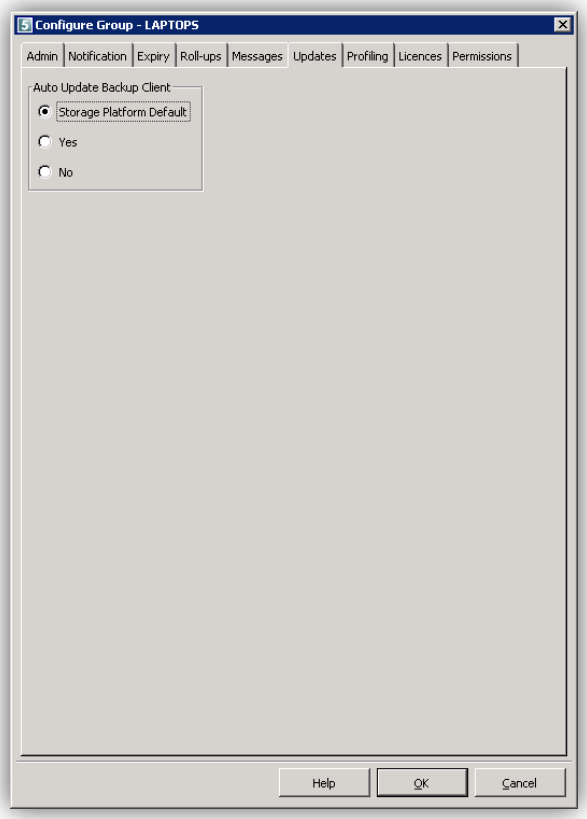
1. Click in the **Messages** tab window.
2. Type the message you wish to display.
3. Click **OK**.

Notes:

- *You may use HTML, e.g.* `<font color=red>...</font>`.
- *If you type* `default` *in the window, the message specified on the AccountServer's* ***Defaults*** *tab will be displayed. (See* Defaults tab *in Chapter 6 "Storage Platform Configuration".)*

Warning: *HTML may include an* `<href>` *tag using* `http` *but not* `https`.

Updates tab



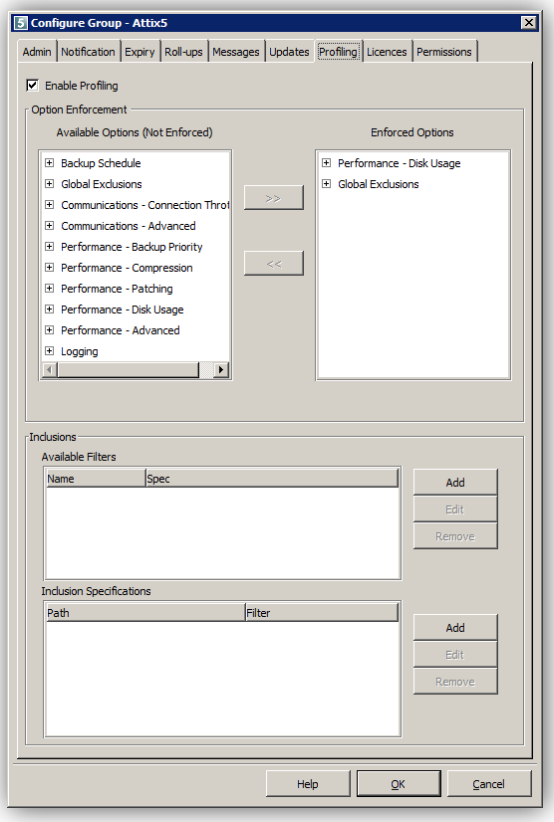
The Storage Platform can automatically update Clients that belong to the Backup Group during the backup process when updates are available.

To enable automatic updates:

Select **Yes**.

The default setting is **Storage Platform default**, which applies the settings configured on the AccountServer. For more information, see "Backup Client Updates" later in this chapter.

Profiling tab



Profiling enables you to propagate most of the client-side settings from the Storage Platform to the Backup Clients belonging to the Backup Group.

Notes:

- *These settings take priority over any settings specified in the Backup Clients.*
- *Plug-ins cannot be profiled.*

To enable profiling at Group level:

1. Select the **Enable Profiling** check box.
2. Configure the profiling settings as desired. For more information on available settings, see "Option Enforcement" and "Inclusions" below.
3. Click **OK**.

Option Enforcement

In the **Option Enforcement** area, the available options are grouped in the same order as in the Backup Client's **Options and Settings** dialog box.

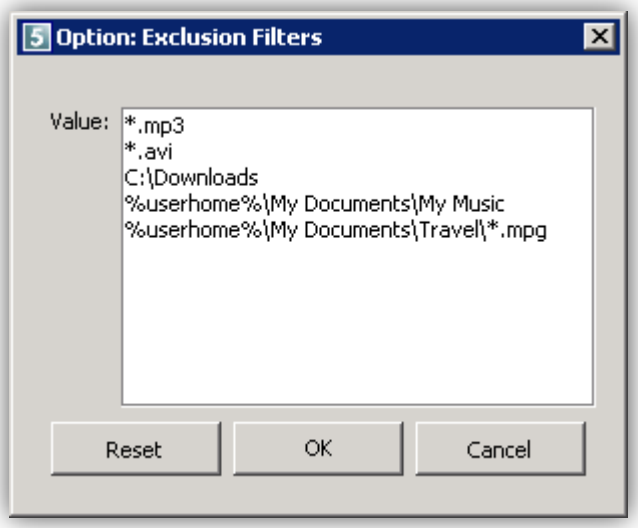
To enforce options on all Backup Clients within the Group:

1. Double-click the option in the **Available Options** box (or select it and then click the >> button). An **Option** dialog box will appear, prompting you for the required setting.
2. Select/specify the required setting(s).
3. Click **OK**.

The option will now display in the **Enforced Options** list and overwrite the setting in the Backup Client. For specified settings that are more than 30 characters long, the Enforced Options list only displays the first 30 characters followed by "...".

*Note: The **System Filters** option includes an **Exclusion Filters** option. This option is very powerful as you can use the `%userhome%` directive, filename wildcards, exact folder names and even a combination of all three to specify an exclusion. Each entry must be added on a new line, as displayed in the screenshot in the example below. For more information on individual options, please refer to the relevant Backup Client User Manual.*

Example:



In the screenshot example above, the exclusions will ensure that:

- *No **mp3** or **avi** files anywhere on the system can be backed up.*
- *The **C:\Downloads** folder and subfolders will be excluded.*
- *The **C:\Documents and Settings\UserName\My Documents\My Music** folder and subfolders will be excluded (where UserName is the user's login name).*

- *Any **mpg** file in **C:\Documents and Settings\UserName\My Documents\Travel** (but **not** subfolders) will be excluded.*

To remove a particular option:

1. Select the option in the **Enforced Options** list.
2. Click the << button.

When a setting is removed, the Backup Client will revert back to the original setting applied before the option was enforced.

Inclusions

The **Inclusions** area enables you to configure the filter, file and folder inclusions that will be added to the backup selection lists of all Backup Clients belonging to the Backup Group.

To add inclusion specifications:

1. Create the list of filters in the **Available Filters:**
   a. Click the **Add** button.
   b. Type the new filter information in the boxes provided.
   c. Click **OK**.

   Example: ***Filter name**: MS Outlook email and **Filter extensions**: *.pst;*.dbx;*.wab.*
2. Use the **Inclusion Specifications** box to specify the inclusions:
   a. Click the **Add** button.
   b. Select the type of data to include. You can include a filtered folder, a complete folder, or a single file.
   c. In the **Path** box, type the location of the folder or file to be included.
   d. Select a filter from the **Filter** drop-down. (The filters you added to the **Available Filters** box will display as the **Filter** options.)
   e. Click **OK**.

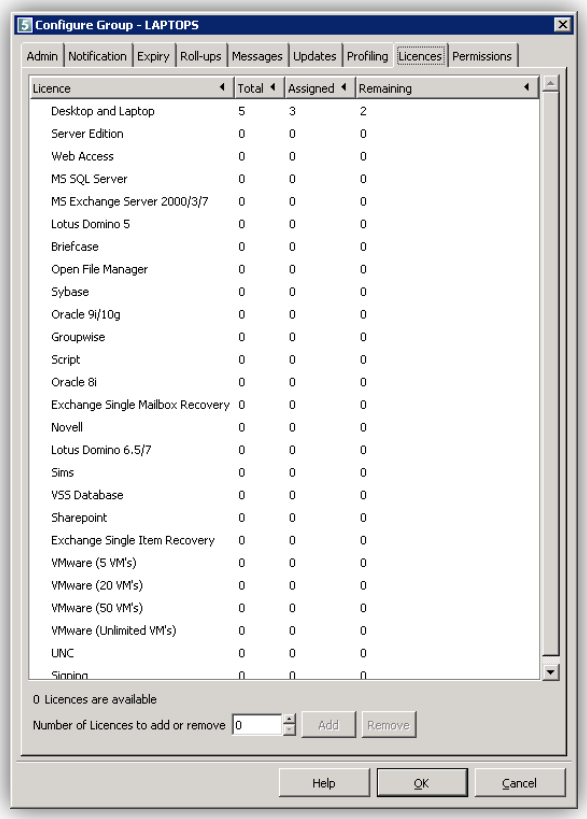
Note: You can also use the `%userhome%` directive as discussed in the previous note.

When the Backup Client connects to the Storage Platform, it will receive the Profiling settings specified on this tab and these changes will be implemented. If any of these changes are modified by the user, they will revert back to the Profiling settings during each backup.

*Note: To connect to the Storage Platform from the Backup Client and receive Profiling updates, click the **Retrieve Settings** button in the Backup Account area of the Backup Client's **Options and Settings** dialog box.*

Licences tab

Use this tab to manage licences allocated to the Storage Platform.



> ***Note:*** *You can add/remove licences that belong to the pool of licences purchased from Attix5. To purchase additional licences, please contact your software provider.*

To add/Remove licences:

1. In the **Licence** column, select the type of licence you wish to add.
   E.g. **Server Edition**.
2. In the **Number of Licences to add or remove** box, type the number of licences to add/remove.

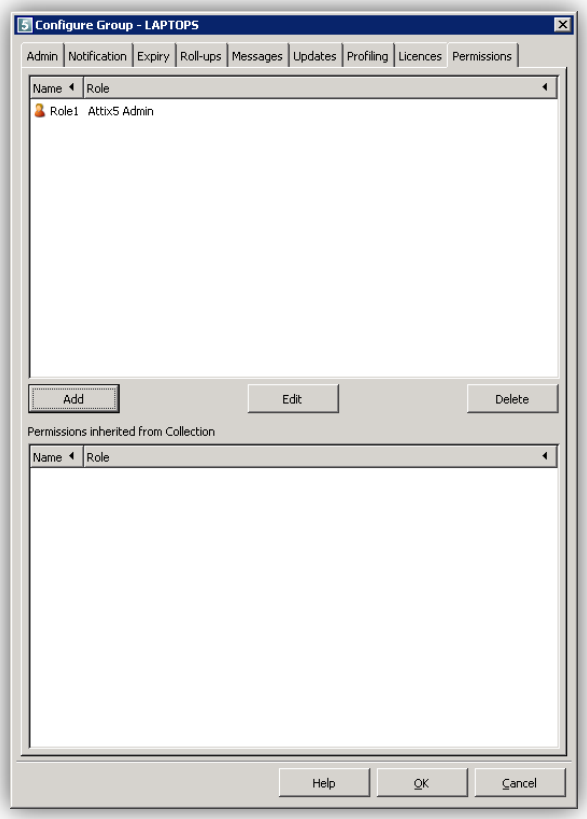
   > ***Tip:*** *If the **Add** button is disabled, ensure that the Collection to which the Group belongs has sufficient licences assigned to it.*

3. Click the **Add/Remove** button.
4. Click **OK**.

For more information, see *Step 3, Add licences to Backup Groups* in Chapter 2, "Getting started".

Permissions tab

Warning: *Please refer to Chapter 9, "User Access Management" before configuring this tab. Access Users/Groups must be created and configured before you can assign permissions to a Group.*



To add Access Users or Access Groups:

1. Click the **Add** button.
2. In the **Group Permissions** dialog box that appears, select the Group/User name in the **Name** drop-down list, select its coinciding role in the **Role** drop-down list, and then click the **Create** button.
3. The **Group Permissions** dialog box will remain open to enable you to add additional Users/Groups. Repeat the process to add new Users/Groups if necessary.
4. When you have added all the necessary Users/Groups, click **Close**.

The new Users/Groups will display in the Permissions list. You can edit or delete Users/Groups in this list at any time.

Note: *Only permissions configured in the User Access Management view will be available to the Access Users when they log in with their user accounts. For more information, see Chapter 9, "User Access Management".*

To edit Users/Groups:

1. Select the User/Group you wish to edit.
2. Click the **Edit** button.
3. In the **Group Permissions** dialog box that appears, modify the settings as desired.
4. Click **Create**.
5. Click **Close**.

The Permissions list will be updated to reflect the changes.

To delete Users/Groups:

1. Select the User/Group you wish to delete.
2. Click the **Delete** button.

The User/Group will disappear from the Permissions list.

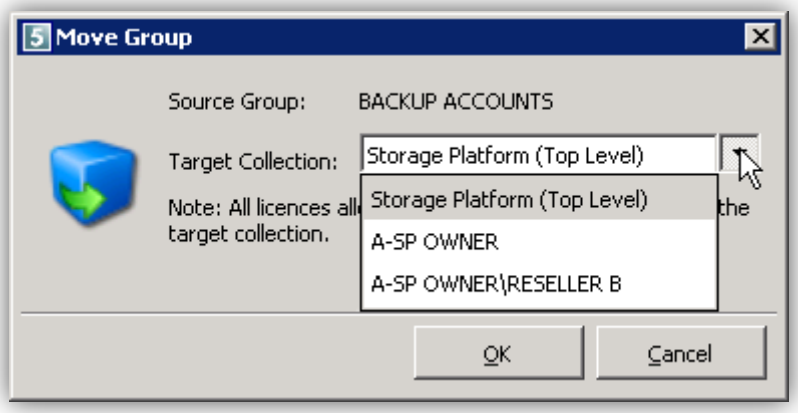
Moving Groups

You can move Backup Groups between Collections.

Note: All licences allocated to the Group will be moved to the target Collection.

To move a Backup Group:

1. In the Account Management view, expand the Account Management tree and select a Group name.
2. On the **Group** menu, click **Move**. Alternatively, right-click the Group name and then click **Move** on shortcut menu that appears.
3. In the **Move Group** dialog box that appears, select a target Collection name.



4. Click **OK**.

The Backup Group will be moved to the target Collection, along with all licences allocated to it and it will inherit the rights assigned to the Collection. Backup Accounts belonging to the Group will be updated when the next backup is initiated.

Exporting the list of Accounts

You can generate a CSV file of all Backup Accounts belonging to a Backup Group. This file can then be opened in a spreadsheet editor.

To export a list of all Backup Accounts belonging to a Backup Group:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Accounts belong.
2. On the **Tools** menu, click **Export CSV**. Alternatively, click the **Export to CSV** button on the main toolbar.
3. In the **Choose export location** dialog box that appears, type a name for the CSV file in the **Name** box or accept the default name provided.
4. Use the **Save in folder** drop-down list and, if necessary, the **Browse for other folders** function to select a location in which to save the file or accept the default location.
5. Click **Save**.

A CSV file containing a list of all the Backup Accounts in the Group will be saved to the specified location and can be opened in any spreadsheet program.

Example:

MANUAL.csv

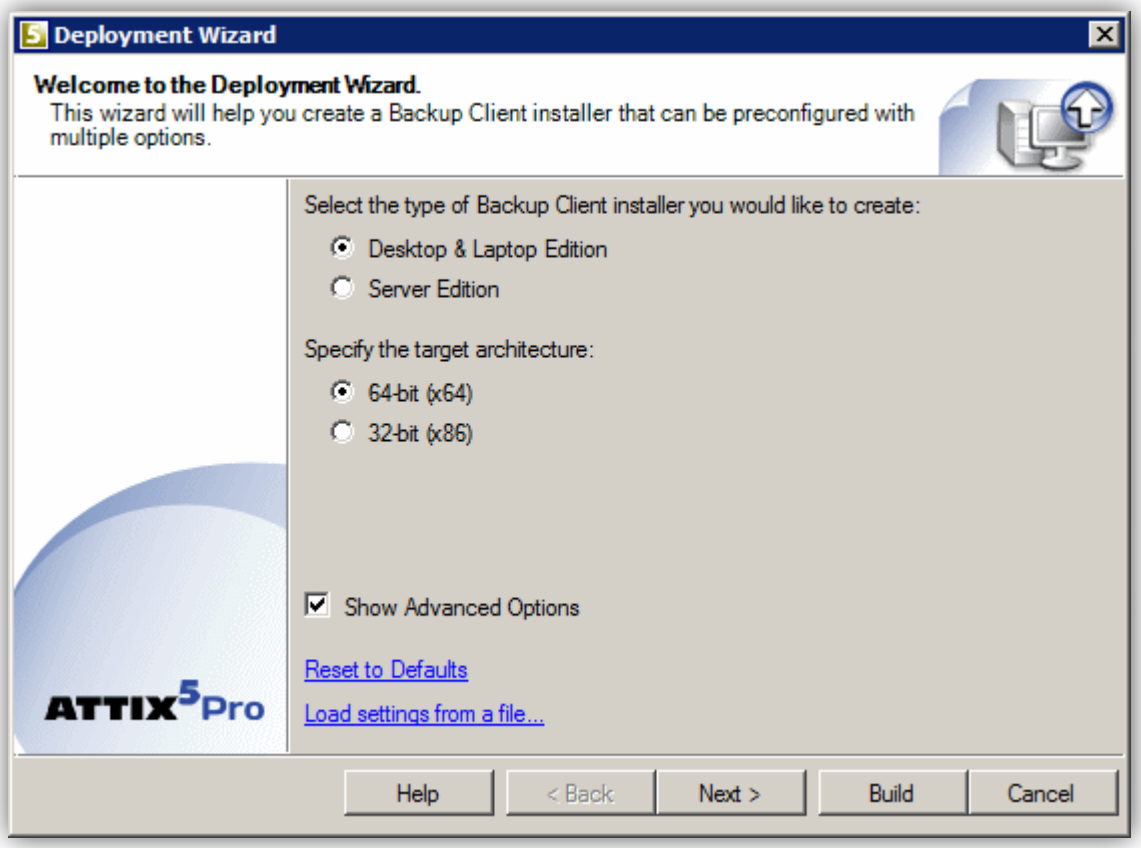
	A	B	C	D	E	F	G	H
1	Account Name	Size	Data Protected	On Disk	Account Usage	Archives	Last Backup Date	Create Date
2	2007EX32VM	1024	0	0	0	0	N/A	2009/07/14
3	MACKIE	1024	0	0	0	1	2009/07/14 13:21	2009/07/14
4	QAWIN2003	1024	0	190948723	0	182	2009/07/13 10:15	2009/07/10
5	XPDLV51	1024	0	155189074	0	216	2009/07/10 18:09	2009/07/10
6								

MANUAL

Creating Backup Client deployments

You can create Backup Client deployments to enable users to create Backup Accounts belonging to a particular Backup Group. These deployments can contain pre-configured Backup Account Setup information. For more information, see "Deployment Wizard" later in this chapter.

Warning: *Certain antivirus programs may result in deployment failures. In such cases, you may need to disable antivirus scanning for the duration of the deployment process.*


Deployment Wizard
Welcome to the Deployment Wizard.
This wizard will help you create a Backup Client installer that can be preconfigured with multiple options.
Select the type of Backup Client installer you would like to create:
Desktop & Laptop Edition
Server Edition
Specify the target architecture:
64-bit (x64)
32-bit (x86)
Show Advanced Options
Reset to Defaults
Load settings from a file...
ATTIX5 Pro
Help
< Back
Next >
Build
Cancel

Working with Group Certificates

As a Backup Administrator, you may find it useful to have access to the encryption keys used by Backup Accounts. You can gain access to these by requesting a Group Certificate from Attix5 and then uploading it to the Storage Platform using the SP Console.

Notes:

- *Attix5 requires a formal letter of request form a Company Director before a Group Certificate will be issued.*
- *This functionality is only available to users with full SP Console Administrative rights. For more information on user permissions, see Chapter 9, "User Access Management".*

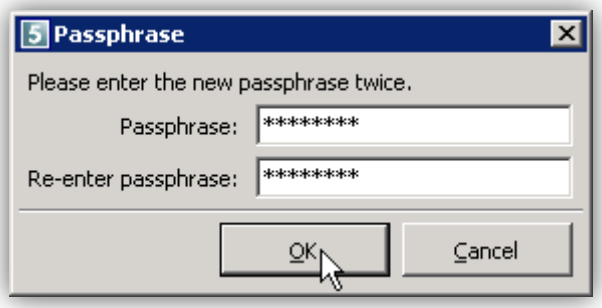
When you request a Group Certificate, a public and private key pair is generated. The public key is used to encrypt the users' encryption key and only the private key can decrypt it. This key pair is stored on your machine, protected by a passphrase, which you will be prompted to choose when requesting the Group Certificate. The public key is then included in a Group Certificate signed by the Attix5 LicenceServer, and stored with the Group on the Storage Platform.

As users back up data, their encryption keys are encrypted with the public key that is stored in the Group Certificate. These encrypted versions of the keys are then stored on the Storage Platform. You can download the encrypted keys and decrypt them on your machine using an SP Console that has the matching Group Certificate private key. In order to do that, you will need to provide the passphrase that decrypts the private key stored on your machine. Since the keys can only be decrypted by the private key, it is only possible for the person in possession of the private key and the passphrase to view them.

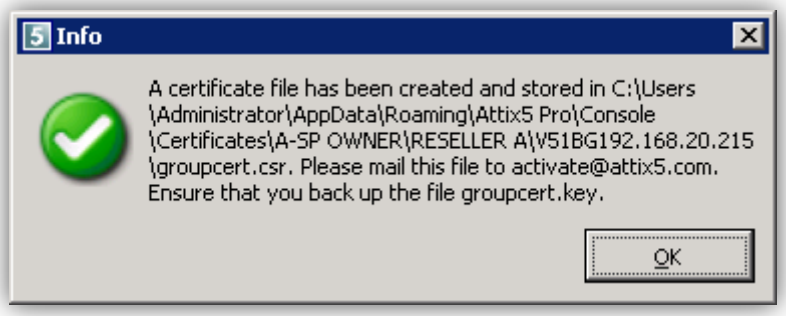
To request a Group Certificate:

1. In the Account Management tree, select the Group name.
2. On the **Group** menu, click **Certificate**. Alternatively, right-click the Group name and then click **Certificate** on the shortcut menu.
3. In the **Group Certificate** dialog box that appears, click **Request Certificate**.
4. In the Information box that appears, click **OK**.
5. In the **Passphrase** dialog box that appears, type a passphrase in the boxes provided, and then click **OK**.

   Warning: *Please remember your passphrase.*



6. An Information dialog box will indicate that a file called “groupcert.csr” has been saved in a particular location. Navigate to that location, zip the groupcert.csr file and email it to **activate@attix5.com**.


Info
A certificate file has been created and stored in C:\Users \Administrator\AppData\Roaming\Attix5 Pro\Console \Certificates\A-SP OWNER\RESELLER A\V51BG192.168.20.215 \groupcert.csr. Please mail this file to activate@attix5.com. Ensure that you back up the file groupcert.key.
OK

Attix5 will now send you a Group Certificate file called “groupcertsigned.crt”. Once received, you need to upload this file to the SP Console. See below.

To upload a Group Certificate to the SP Console:

1. Navigate to the certificate on the machine running the SP Console.

   Tip: The default certificate location varies depending on the server's operating system.

   Windows Server 2008/Windows 7/Windows Vista:
   C:\Users[Current user]*\AppData\Roaming\Attix5 Pro\Console\Certificates*

   Windows Server 2003/Windows XP:
   C:\Documents and Settings[Current user]*\Application Data\Attix5 Pro\Console\Certificates*

2. The **Certificates** folder contains subfolders for each Collection and/or Backup Group on the Storage Platform. Paste the groupcertsigned.crt file into the relevant Group folder.

   Tip: The format of the folder is GroupnameAccountServerIP.

   *Example: With a Collection called **A-SP OWNER**, another Collection, **RESELLER A**, within it, and a Backup Group named **BACKUP ACCOUNTS** within that, the folder would be called **BACKUPACCOUNTS192.168.20.120** and the path would be: Certificates\A-SP OWNER\RESELLER A\BACKUPACCOUNTS192.168.20.120.*

3. In the SP Console, expand the Account Management tree and then select the Group name.
4. On the **Group** menu, click **Certificate**. Alternatively, right-click the Group name and then click **Certificate** on the shortcut menu.
5. In the **Group Certificate** dialog box that appears, click **Upload Group Certificate**.

   Note: This process must be authorised by your Service Provider before a certificate will be generated.

Each Backup Account user's encryption key will be captured when the Account performs a successful backup.

To confirm when a Group Certificate expires:

1. In the SP Console, expand the Account Management tree and then select the Group name.
2. In the work area, click the **Certificate** tab. The Group Certificate Information will be displayed in the top half of the tab with the expiry dates.

To reactivate the Group Certificate:

1. Locate the certificate files on the machine running the SP Console. (See ***Tips*** in "To upload a Group Certificate to the SP Console" above.)
   There are 3 files in the Backup Group's folder:
   - groupcert.csr
   - groupcert.key
   - groupcertsigned.crt
2. Zip the groupcert.csr file and email it to **activate@attix5.com**. In the message body, mention that this is a re-activation of an existing groupcert. A new groupcertsigned.crt file will be sent back (zipped).
3. Unzip the new file and replace the existing one.
4. Open the SP Console, right-click on the Backup Group in the Account Management tree and then click **Certificate**.
5. Click **Upload Group Certificate** and supply the passphrase.

The re-activated certificate will be uploaded and you can then view any encryption keys captured before the certificate expired.

Warning: *When an existing Group Certificate has expired,* ***do not request a new one****. Please zip the contents of the certificate folder and send it to* **activate@attix5.com** *with a request that it be renewed.* ***If you request a new group certificate, the current encryption keys will be lost.***

After requesting a new group certificate, new key pairs are created that will not match the current groupcert loaded on the Storage Platform and the key capture will not work. In such an event, you need to delete the current groupcert on the AccountServer.

To delete the Group Certificate on the AccountServer:

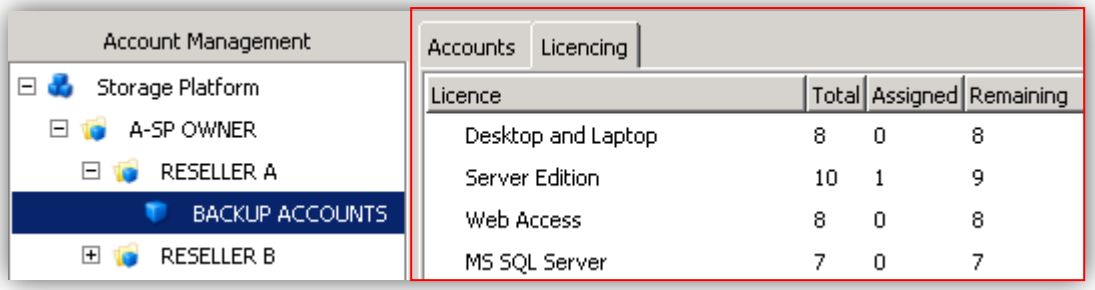
1. In the Account Management tree, select the Group name.
2. On the **Group** menu, click **Certificate**. Alternatively, right-click the Group name and then click **Certificate** on the shortcut menu.
3. In the **Group Certificate** dialog box that appears, click **Delete Certificate**.
4. In the Confirmation dialog box that appears, click **Yes**.

Note: You may wish to delete the Group Certificate if:

- *you requested a new groupcert after the previous one expired (See Warning above)*
- *you cannot find the **Certificate** folder mentioned above*
- *you cannot recall the passphrase to access the keys*

Account Management licencing

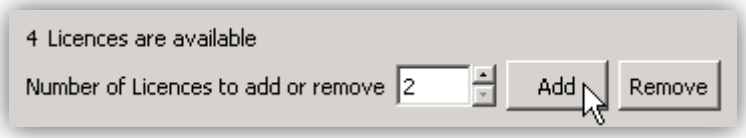
A **Licencing** tab that displays in the work area when you select a Group or Collection in the Account Management tree provides you with a summary of all licences allocated to the Storage Platform.



Note: You can add/remove licences that belong to the pool of licences purchased from Attix5. To purchase additional licences, please contact your software provider.

To add/remove licences:

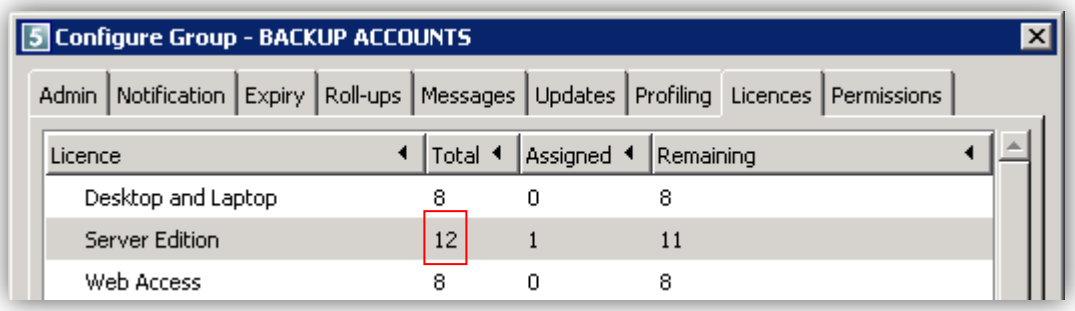
1. In the Account Management tree, select the Group or Collection name.
2. On the **Group** or **Collection** menu, click **Configure**. Alternatively, click the **Configure** button on the main toolbar or right-click the Group or Collection name and then click **Configure** on the shortcut menu that appears.
3. In the **Configure Group** dialog box that appears, click the **Licences** tab.
4. In the Licences list, select the name of the licence you wish to add/remove.
5. Type the number of licences to add/remove in the **Number of Licences to add or remove** box.
6. Click the **Add/Remove** button.



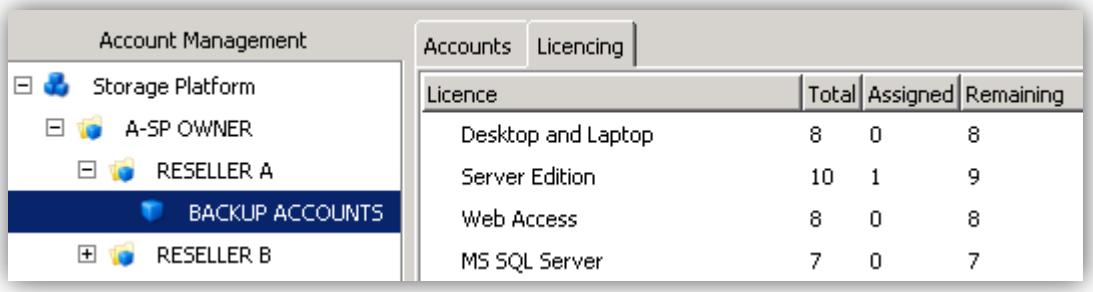
7. Click **OK**.

Note: When you add licences to a Group or Collection, the number of available licences in the parent Collection is updated accordingly.

The number of licences assigned to the Backup Group will display in the ***Total*** *column on the* ***Licences*** *tab in the* ***Configure Group*** *dialog box.*



The number of licences will also display in the ***Total*** *column on the* ***Licencing*** *tab in the Account Management view.*



Once licences have been added to a Backup Group, a deployment MSI (installer) file can be created from it and used to install Backup Clients onto desktop, laptop or server machines. Those installations will enable users to create new Backup Accounts that belong to the Backup Group from which the MSI was deployed. For each Backup Account created, one licence is assigned and the number of remaining licences available for use displays in the **Remaining** column.

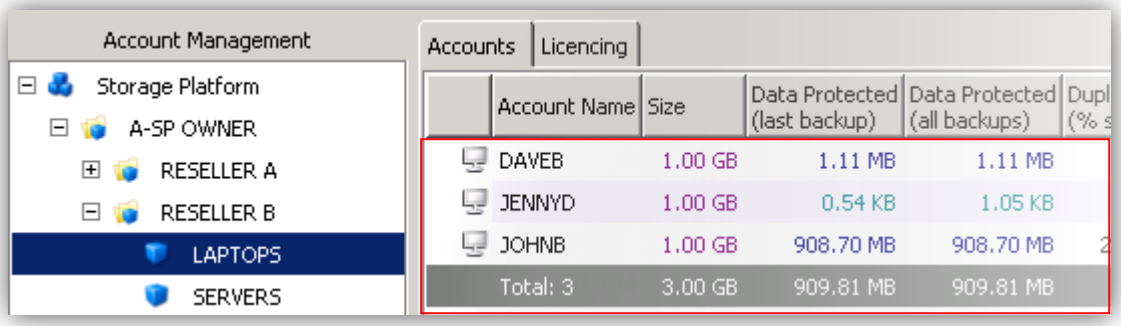
Access often-used reports

To access often-used Backup Group reports:

1. In the Account Management view, expand the Account Management tree and right-click the Backup Group whose reports you want to access.
2. Point to **Reports**, and then select the report that you want to access.

Backup Accounts

If a Backup Group is selected in the Account Management tree, a list of all the Backup Accounts belonging to that Group will display in the work area along with individual Account data such as the Account limit, last backup size, total backup size, etc.



Note: The Access User with Admin rights has full control of the Backup Accounts. For more information on Access Users, see "Permissions tab" earlier in this chapter.

You can perform the following actions on Backup Accounts using the SP Console:

- **Delete Account**

  Note: For information on creating Backup Accounts, please refer to the relevant Backup Client User Manual (Attix5 Pro Desktop & Laptop User Manual or Backup Edition Server Edition User Manual).
- **Change Account size**
- **Enable/Disable Account**
- **Upgrade/Downgrade Account**
- **Rename Account**
- **Connect to Backup Client (See "Remote Management" later in this chapter)**
- **Change User Password**
- **Change Group (Move Account)**
- **Export Account list to CSV**

The following additional and advanced options are also available when you right-click on a Backup Account.

- **Import Backup Snapshot**
- **Export Restore Snapshot**
- **Initiate/Schedule Integrity Check**
- **Change the StorageServer it connects to**
- **Override StorageServer IP address**
- **Copy Account GUID to Clipboard**
- **Access often-used reports**

Tips:

- *Multiple Accounts in the same Backup Group can be highlighted by using the **SHIFT** or **CTRL** keys and then selecting them with your mouse.*
- *The actions most commonly performed by administrators can be initiated using the buttons on the toolbar.*

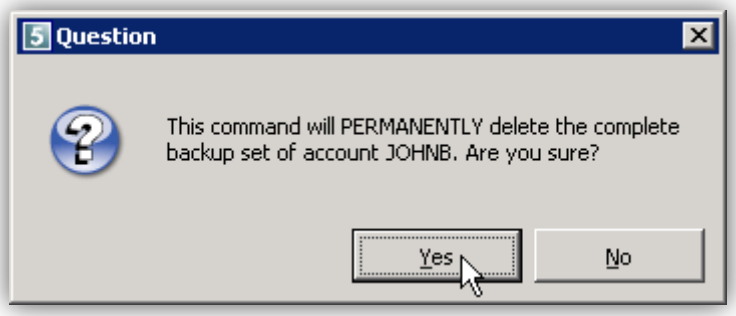
Adding and deleting Accounts

Adding Backup Accounts

Backup Accounts are created during the Account Wizard. For more information, please refer to the relevant Client User Manual (Attix5 Pro Desktop & Laptop User Manual or Backup Edition Server Edition User Manual).

To delete an Account:

1. In the Account Management view, expand the Storage Platform tree and select the name of the Group to which the Account belongs.
2. In the work area, ensure that the **Accounts** tab is selected.
3. Select the name of the Account you wish to delete.
4. On the **Accounts** menu, click **Delete**. Alternatively, click the **Delete** button on the main toolbar or right-click the Account name and then click **Delete** on the shortcut menu.
5. In the confirmation box that displays, click **Yes**.



Warnings:

- *This command will **PERMANENTLY** delete the complete set of backed up files belonging to the Backup Account. If unsure about whether or not to delete the Backup Account, please consider disabling the Backup Account instead. (See "Disabling Accounts" later in this chapter.)*
- *If the Backup Account is being mirrored, by default it will be deleted from the MirrorServer as soon as the delete command is issued.*

Changing an Account's size

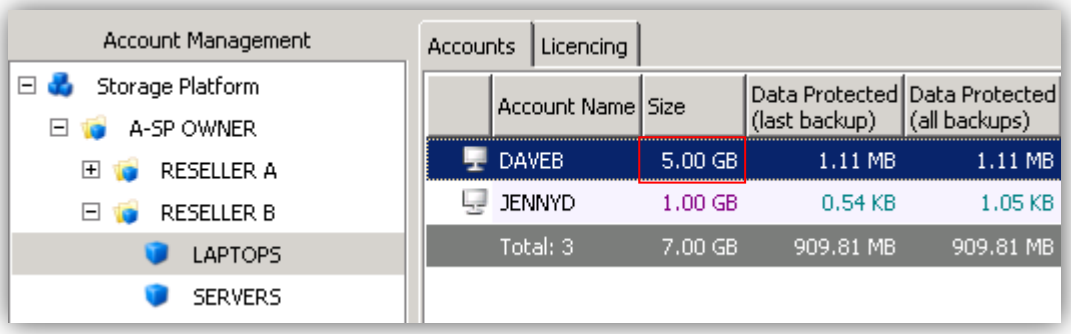
As the Backup Administrator, you may wish to change the backup limit for Accounts.

You can increase or decrease the disk space allowed for each Account's backups by changing the Account size in the Console.

To change the Account size:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Account belongs.
2. In the work area, ensure that the **Accounts** tab is selected.
3. Select the name of the Account you wish to modify.
4. On the **Accounts** menu, click **Change Account Size**. Alternatively, click the **Size** button on the main toolbar or right-click the Account name and then click **Change Account Size** on the shortcut menu that appears.
5. In the **Change Account Size** dialog box that appears, type the new Account limit (in Gigabytes) in the **Enter a new size in GB** box, and then click **OK**.

The Account size limit will be updated on the Storage Platform and the new maximum value will display in the **Size** column on the **Accounts** tab.



Enabling an Account

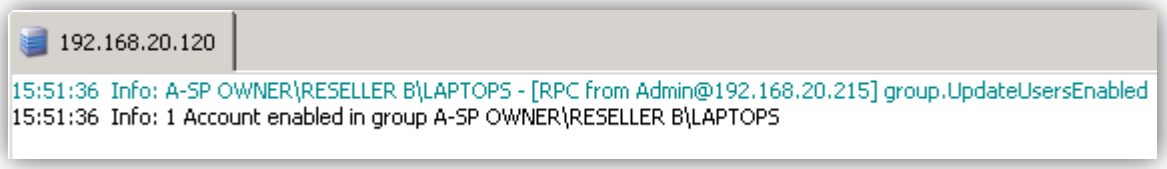
Using the SP Console, you can enable an Account that was previously disabled, thereby allowing it to back up to the Storage Platform again.

Note: An Account could have been disabled as a result of manual disabling (see below) or an action such as a Backup Snapshot (see Importing a Backup Snapshot later in this chapter).

To enable an Account:

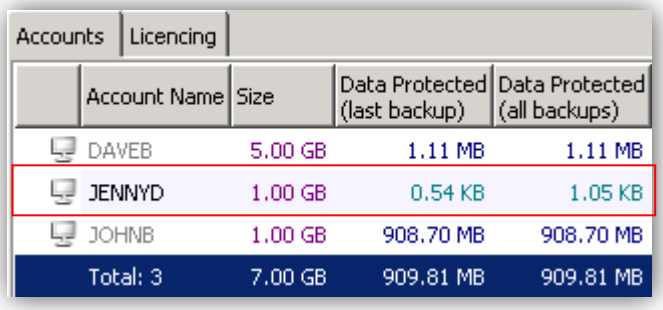
1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Account belongs.
2. In the work area, ensure that the **Accounts** tab is selected.
3. Select the name of the Account you wish to enable.
4. On the **Accounts** menu, click **Enable**. Alternatively, click the **Enable** button on the main toolbar or right-click the Account name and then click **Enable** on the shortcut menu that appears.

The Account will be enabled and a message logged in the **Diagnostics** area:


192.168.20.120
15:51:36 Info: A-SP OWNER\RESELLER B\LAPTOPS - [RPC from Admin@192.168.20.215] group.UpdateUsersEnabled
15:51:36 Info: 1 Account enabled in group A-SP OWNER\RESELLER B\LAPTOPS

The user of this Backup Account will now be able to back up to the Storage Platform.

*Tip: Enabled Accounts display as active on the **Accounts** tab. Disabled Accounts are greyed out.*


Accounts
Licencing
Account Name
Size
Data Protected (last backup)
Data Protected (all backups)
DAVEB 5.00 GB 1.11 MB 1.11 MB
JENNYD 1.00 GB 0.54 KB 1.05 KB
JOHNB 1.00 GB 908.70 MB 908.70 MB
Total: 3 7.00 GB 909.81 MB 909.81 MB

Disabling an Account

Using the Console, you can disable an Account, preventing any further backups to the Storage Platform from that Account.

To disable an Account:

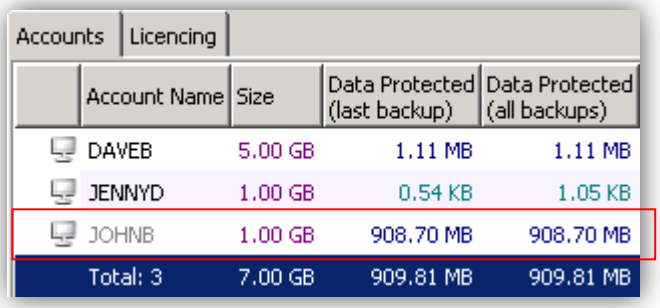
1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Account belongs.
2. In the work area, ensure that the **Accounts** tab is selected.
3. Select the name of the Account you wish to disable.
4. On the **Accounts** menu, click **Disable**. Alternatively, click the **Disable** button on the main toolbar or right-click the Account name and then click **Disable** on the shortcut menu that appears.

The Account will be disabled and a message logged in the **Diagnostics** area:

192.168.20.120
15:52:25 Info: 1 Account disabled in group A-SP OWNER\RESELLER B\LAPTOPS
15:52:34 Info: A-SP OWNER\RESELLER B\LAPTOPS - [RPC from Admin@192.168.20.215] group.UpdateUsersEnabled

The user of this Backup Account will no longer be able to back up to the Storage Platform but you can enable the Account again at any time to allow further backups. For more information, see "Enabling an Account" above.

*Tip: Disabled Accounts are greyed out on the **Accounts** tab.*


Accounts
Licencing
Account Name
Size
Data Protected (last backup)
Data Protected (all backups)
DAVEB 5.00 GB 1.11 MB 1.11 MB
JENNYD 1.00 GB 0.54 KB 1.05 KB
JOHNB 1.00 GB 908.70 MB 908.70 MB
Total: 3 7.00 GB 909.81 MB 909.81 MB

Upgrading an Account

Using the SP Console, you can upgrade an Account to change its status from Evaluation to Registered.

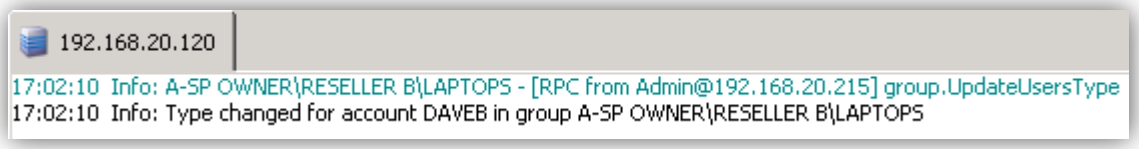
Note:

- *In cases where Backup Accounts have been created within Evaluation Groups, they will automatically be created as Evaluation Accounts. If the Group is later upgraded to "Registered", its Accounts will remain "Evaluation" Accounts until manually upgraded as described below.*
- *Once an Account is registered, it is advised to move it out of the Evaluation Group and into a Registered one.*
- *Evaluation Accounts display an advertisement in the form of a banner at the bottom of the application window. This banner cannot be closed by the user.*

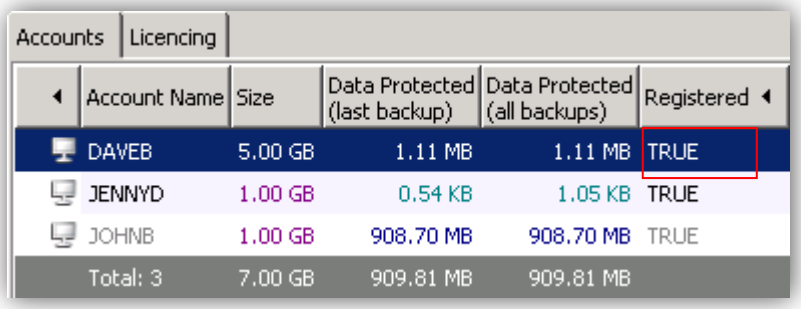
To upgrade an Account:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Account belongs.
2. In the work area, ensure that the **Accounts** tab is selected.
3. Select the name of the Account you wish to upgrade.
4. On the **Account** menu, click **Upgrade**. Alternatively, click the **Upgrade** button on the main toolbar or right-click the Account name and then click **Upgrade** on the shortcut menu that appears.
5. Click the button on the toolbar. Alternatively, on the **Accounts** menu, click **Upgrade**.

The Account status will be changed from Evaluation to Registered and a record of the change will display in the **Diagnostics** area:


192.168.20.120
17:02:10 Info: A-SP OWNER\RESELLER B\LAPTOPS - [RPC from Admin@192.168.20.215] group.UpdateUsersType
17:02:10 Info: Type changed for account DAVEB in group A-SP OWNER\RESELLER B\LAPTOPS

*Tip: The Account status will display on the **Accounts** tab's **Registered** column:*


Accounts
Licencing
Account Name
Size
Data Protected (last backup)
Data Protected (all backups)
Registered
DAVEB 5.00 GB 1.11 MB 1.11 MB TRUE
JENNYD 1.00 GB 0.54 KB 1.05 KB TRUE
JOHNB 1.00 GB 908.70 MB 908.70 MB TRUE
Total: 3 7.00 GB 909.81 MB 909.81 MB

To change a Backup Account's status from Registered to Evaluation, you need to *Downgrade* the Account.

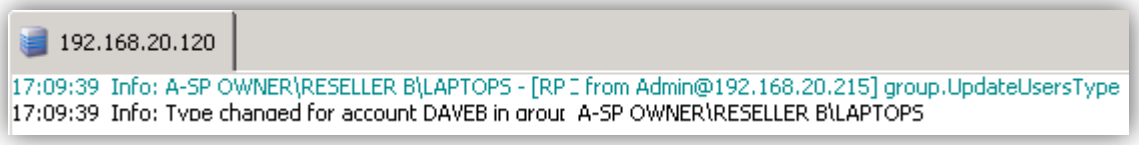
Downgrading an Account

Using the SP Console, you can downgrade an Account to change its status from Registered to Evaluation.

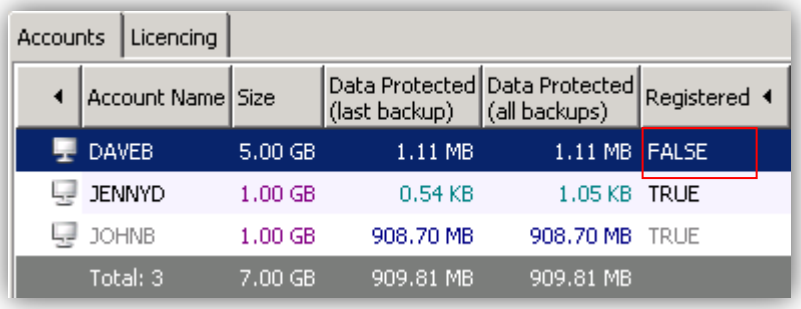
To downgrade an Account:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Account belongs.
2. Ensure that the **Accounts** tab is selected.
3. Select the name of the Account you wish to downgrade.
4. Click the **Downgrade** button on the toolbar. Alternatively, on the **Accounts** menu, click **Downgrade**.

The Backup Account status will be changed from Registered to Evaluation and a record of the change displays in the **Diagnostics** area:


192.168.20.120
17:09:39 Info: A-SP OWNER\RESELLER B\LAPTOPS - [RP from Admin@192.168.20.215] group.UpdateUsersType
17:09:39 Info: Type changed for account DAVEB in grou A-SP OWNER\RESELLER B\LAPTOPS

The Account status will display on the **Accounts** tab's **Registered** column:


Accounts
Licencing
Account Name
Size
Data Protected (last backup)
Data Protected (all backups)
Registered
DAVEB 5.00 GB 1.11 MB 1.11 MB FALSE
JENNYD 1.00 GB 0.54 KB 1.05 KB TRUE
JOHNB 1.00 GB 908.70 MB 908.70 MB TRUE
Total: 3 7.00 GB 909.81 MB 909.81 MB

Tips:

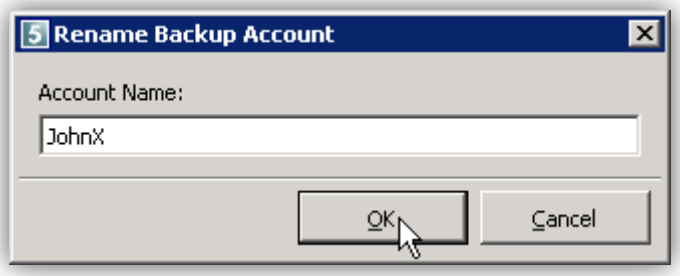
- *If you do not see the **Registered** column on the **Accounts** tab, click **Customise Columns** on the **View** menu or click the **Columns** button on the main toolbar, select the **Registered** check box, and then click **Close**.*
- *You can then move the column to the position that best suits your management needs by clicking the column heading and using a drag-and-drop operation.*

Renaming a Backup Account

You can rename a Backup Account using the SP Console.

To rename a Backup Account:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Account belongs.
2. Ensure that the **Accounts** tab is selected in the work area.
3. In the Accounts list, select the name of the Account you wish to rename.
4. On the **Account** menu, click **Rename**. Alternatively, right-click the Account name and then click **Rename** in the shortcut menu that appears.
5. In the **Rename Backup Account** dialog box that appears, type a new name for the Account.
6. Click **OK**.



At the next backup or restore, the Client will adopt the new name and update its details accordingly.

Changing a user password

You can change the user password associated with a Backup Account using the SP Console.

To change a user password:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Account belongs.
2. Ensure that the **Accounts** tab is selected in the work area.
3. In the Accounts list, select the name of the Account you wish to change the user password for.
4. On the **Account** menu, click **Change user password**. Alternatively, right-click the Account name and then click **Change user password** on the shortcut menu.
5. In the **Change password for user <username>** dialog box that appears, type the new password in the **Password** box and then re-type it in the **Re-enter password** box.
6. Click **OK**.

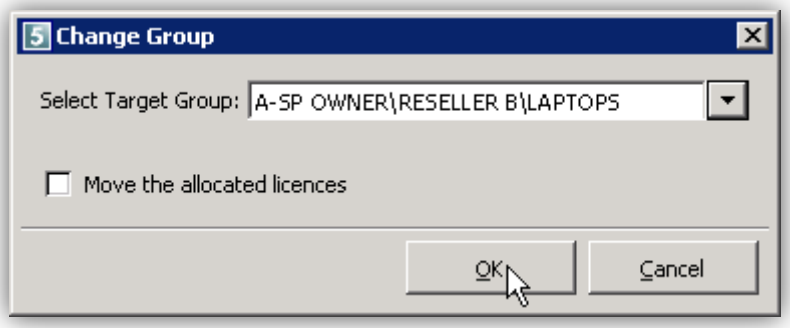
Once the Backup Client user changes the password on the client-side, he/she will be able to back up data to the Storage Platform using the new password.

Changing the Backup Group (moving a Backup Account)

Using the SP Console, you can move a Backup Account from one Backup Group to another.

To change the Backup Group that a Backup Account belongs to:

1. In the Account Management view, expand the Account Management tree and select the name of the Backup Group to which the Account belongs.
2. Ensure that the **Accounts** tab is selected in the work area.
3. In the Accounts list, select the name of the Backup Account you wish to move.
4. On the **Account** menu, click **Change Group**. Alternatively, right-click the Backup Account name and then click **Change Group** on the shortcut menu.
5. In the **Change Group** box that appears, use the **Select Target Group** arrow to select a new Backup Group name.
6. Select the **Move the allocated licences** check box to ensure that all associated licences are moved with the Account.
7. Click **OK**.



The Backup Account will disappear from the Group's Accounts list and be listed under the new Backup Group name in the Account Management tree. Select the name of the new destination Backup Group in the Account Management tree to view and continue managing the Backup Account.

Notes:

- *If you move the Backup Account from a Backup Group configured for mirroring to a Group that is not configured for mirroring, the Account will be deleted from the MirrorServer after the retention period set on the MirrorServer has elapsed (the default is 24 hours).*
- *If you move the Backup Account from a Backup Group on a StorageServer that is configured for mirroring to a Group on another StorageServer (also configured for mirroring but to a different MirrorServer), the Backup Account will be moved between MirrorServers automatically. No manual MirrorServer configuration is necessary.*

Changing the StorageServer

Using the SP Console, you can move a Backup Account from one StorageServer to another.

*Note: You will only see this option on your **Account** menu if you manage more than one StorageServer with the SP Console.*

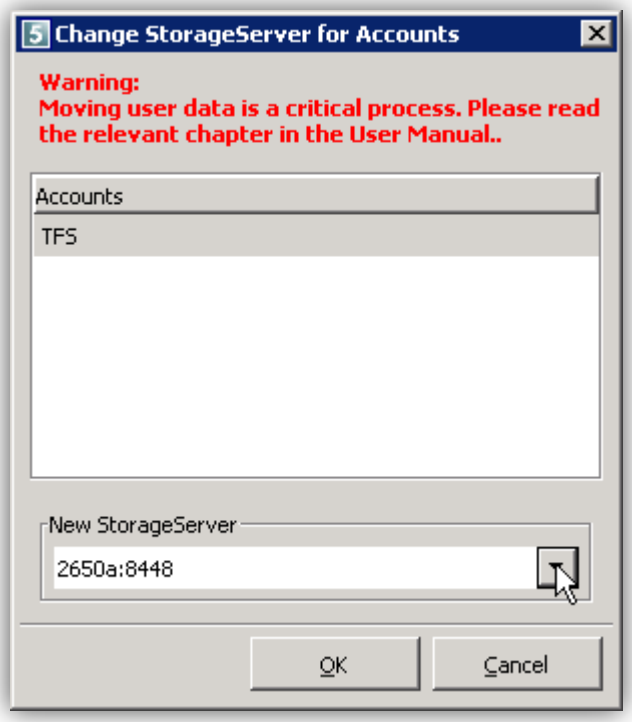
***Warning:** When moving a Backup Account between StorageServers, the major and minor versions of the destination StorageServer must be the same as the source StorageServer, or later. If this is not the case, the move will fail with an appropriate message appearing in the StorageServer log.*

Example: In V6.2.3, 6 is the major version and 2 is the minor version. Therefore, if the source StorageServer is V6.2.3, the Backup Account can be moved to a V6.2.2 StorageServer, but not to a V6.1.1 StorageServer.

To move a Backup Account to another StorageServer:

1. In the Account Management view, expand the Account Management tree and select the name of the Backup Group to which the Account belongs.
2. Ensure that the **Accounts** tab is selected in the work area.
3. In the Accounts list, select the name of the Backup Account you wish to move.
4. On the **Account** menu, click **Change StorageServer**. Alternatively, right-click the Backup Account name and then click **Change StorageServer** on the shortcut menu.
5. In the **Change StorageServer** box that appears, select a Backup Account in the Accounts list.
6. Use the **New StorageServer** arrow to select a destination StorageServer.
7. Click **OK**.

The Backup Account will be moved to the new StorageServer.



Advanced actions

Advanced actions can be accessed from the menu bar or by right-clicking on an Account name and then pointing to **Advanced** in the shortcut menu.

Warning: *Please be careful when changing any of these settings.*

Importing a Backup Snapshot

The Backup Snapshot feature in DL and SE Clients enables users to create a backup of all selected files on the Client for transferral to the Storage Platform using a removable storage device.

Tip: *This feature is useful when the amount of data to be transferred to the Storage Platform is too great to transfer over the Internet.*

After creating a Backup Snapshot using a Backup Client (see relevant Client User Manual), you can import the data to a StorageServer using the SP Console as described below.

To import a Backup Snapshot:

1. In the Account Management view, expand the Account Management tree and then select the name of the Group to which the Client's Backup Account belongs.
2. Ensure that the **Accounts** tab is selected in the work area.
3. In the Accounts list, select the name of the Account that you wish to import the Snapshot for.
4. On the **Account** menu, point to **Advanced**, and then click **Import Backup Snapshot**. Alternatively, right-click the Account name, point to **Advanced**, and then click **Import Backup Snapshot** on the shortcut menu.
5. In the **Import Backup Snapshot from disk** dialog box that displays, click the **Copy** button to copy the StorageServer location path.
6. Access the StorageServer on which the Account resides, open Windows Explorer, paste the location into the Address bar, and then press **Enter**.
7. Copy the Snapshot data from the storage device and then paste it into the location.

   Note: *Do not transfer the entire Snapshot folder (e.g. 1e83bb93-cf93-4db2-a2a4-10af49785f8b [GUID filename]). You need to transfer the folder within it (the folder name starts with the date on which the snapshot was made [e.g. 20100506xxxxxx, which was made on the 06th May 2010]).*

8. Once the Snapshot data is in the correct location, click **OK** in the SP Console's **Import Backup Snapshot from disk** dialog box.

9. In the **Info** dialog box that appears, click **OK**. When the process has completed, it will be logged in the StorageServer's Diagnostics window.
   (E.g. `16:13:34 Info: A-SP OWNER\RESELLER A\SERVERS\SERVER01 - Backup Snapshot Import completed successfully.`)

The StorageServer has now been updated with the latest Backup Client data and the Backup Account will be re-activated automatically. The Backup Client user can now continue backing up data as usual.

Exporting a Restore Snapshot (Disaster Recovery)

The Restore Snapshot feature enables you to take data from the Storage Platform and make it available to the Backup Client for restores using a mobile storage device.

Tip: This feature is useful when the amount of data to be transferred to the Backup Client is too great to transfer over the Internet within a limited time frame (e.g. in a Disaster Recovery scenario).

To export a Restore Snapshot to a mobile storage device:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Client's Backup Account belongs.
2. Ensure that the **Accounts** tab is selected in the work area.
3. In the Accounts list, select the name of the Account for which you wish to export a Restore Snapshot.
4. On the **Accounts** menu, point to **Advanced**, and then click **Export Restore Snapshot**. Alternatively, right-click the Account name, point to **Advanced**, and then click **Export Restore Snapshot** on the shortcut menu that appears.
5. In the **Snapshot recovery from Disk** dialog box that appears, select a backup to restore using the **Backup to restore** arrow.
6. If the encryption key is not currently available, an **Encryption key** box will prompt you for it.

   *Note: To enable the Console to export the Restore Snapshot upon clicking **OK**, as described in step 8 below, enter the key and then proceed to the next step. Leaving this box blank will result in the Restore Snapshot being queued until the Backup Client performs its next backup.*

   *Tip: If the key is currently available, the **Encryption key** box will NOT be displayed, and the snapshot export will be performed upon clicking **OK** in step 8 below.*
7. Click the **Copy** button to copy the Restore Snapshot location to the Clipboard or make a note of the Restore Snapshot location to refer to later.
8. Click **OK**. Once complete, the StorageServer Diagnostics window will log a "Snapshot Restore completed successfully" message.
9. On the StorageServer machine, open Windows Explorer, paste the Restore Snapshot location into the Address bar (or navigate to it), and then press **Enter**.
10. Copy the Snapshot and paste it into the desired location on your mobile storage device.

You can now transfer the snapshot data from the storage device or server to another machine and import the backup information to the Backup Client, enabling the user to restore any/all files via the **Restore** tab. For more information, please refer to the relevant Backup Client User Manual.

Tip: You can also restore data using the SP Console's Remote Management feature. See "Remote Management" later in this chapter.

Preparing a Recovery Server for a Snapshot

Another option for recovery to site is to use a dedicated StorageServer, acting as a Recovery StorageServer, which can be made locally available to the site (especially useful if the site has experienced major data loss over multiple Backup Accounts). This can be done by recovering from a typical MirrorServer that hosts the same Backup Account data required for such a disaster recovery. For more information and assistance with the process, please contact your Attix5 vendor.

Importing HSM data

To make a Backup Account's HSM data available for restore via the Backup Client, you need to import the relevant HSM data.

> ***Note:*** *HSM data consists of roll-ups that have been archived before being deleted from the Storage Platform. For more information on roll-ups, see* Roll-ups tab *in Chapter 6, "Backup Groups".)*

To import a Backup Account's HSM data:

1. Navigate to the StorageServer's HSM Export folder.

   > ***Tip:*** *The location is defined on the* ***HSM*** *tab of the* ***Configure StorageServer*** *dialog box. See* HSM tab *in Chapter 7, "Storage Platform Configuration".*

2. Note the name of the Backup Group to which the Backup Account belongs and then open the matching folder in the HSM location.

   > ***Tip:*** *The matching HSM folder names follow the syntax:* ***GroupName_AccountName****, e.g.* ***ALLSERVERS_SERVER6****.*

3. HSM folders are named according to the last backup date contained in the roll-up. Open the folder containing the roll-ups you wish to make available to the Client for restoring.

   > ***Tip:*** *Roll-up folders names follow the syntax:* ***YearMonthDayHourMinuteSecond****. E.g.* ***20100614115403*** *(which represents 14th June 2010, 11:54:03).*

4. In the archived roll-up folder, you'll find either an HSM folder (with a folder name that matches that of the Backup Account GUID) or a single HSM Tar file.
   a. If a full HSM folder is available, copy it to the Clipboard (the folder name should match that of the Backup Account GUID.)
   b. If a single Tar file is available, you first need to untar the file and then copy the untarred files and folders to the Clipboard.
5. Paste the HSM data (GUID folder name) into the StorageServer's HSM Import folder.

   > ***Tips:***
   > - *The* ***Import*** *folder location is defined on the* ***HSM*** *tab of the* ***Configure StorageServer*** *dialog box. See* HSM tab *in Chapter 7, "Storage Platform Configuration".*
   > - *If importing V5 HSM data, you need to recreate the V5* ***Import*** *folder structure as follows:* ***Import\HSM\GroupName\AccountName\[Roll-up folder]****.* E.g. ***Import\HSM\GroupName\AccountName\20090131235959****.*
   > - *To import multiple HSM archives, paste the HSM data (GUID folder name) for each archive that you want to import into the StorageServer's HSM Import folder. If you are informed that the folder already exists and asked whether you want to merge the folders, click* ***Yes****.*

The HSM data should now be available for restore from the Backup Client.

Initiating/Scheduling Integrity Checks

You can do an Integrity Check on a specific Backup Account, which is useful if you suspect that the data may be corrupt on the Storage Platform. During each monthly roll-up, should any data be corrupt, an automatic Integrity Check will occur to fix or retransmit corrupt data.

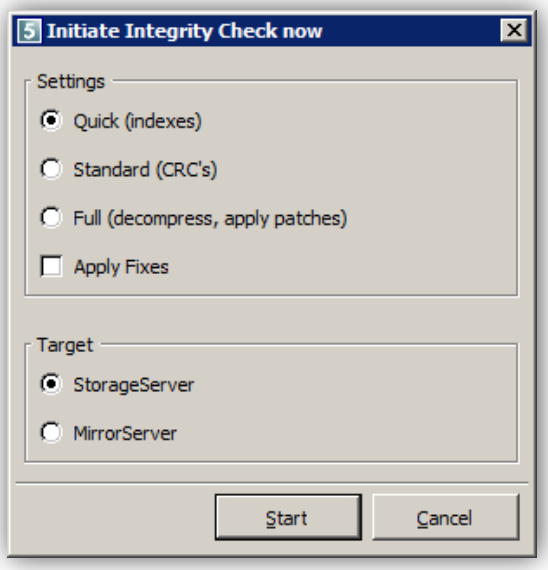
Warning: *An Integrity Check may take some time to complete and may result in high processor usage.*

Tip: *You can monitor the progress of an Integrity Check in the StorageServer Diagnostics window (at the bottom of the screen).*

You can initiate an Integrity Check manually or schedule automatic Integrity Checks.

To initiate an Integrity Check manually:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Backup Account belongs.
2. Ensure that the **Accounts** tab is selected in the work area.
3. In the Accounts list, select the name of the Backup Account on which you wish to perform an Integrity Check.
4. On the **Account** menu, point to **Advanced**, point to **Integrity Checks**, and then click **Initiate Integrity Check now**. Alternatively, right-click the Backup Account name, point to **Advanced**, point to **Integrity Checks**, and then click **Initiate Integrity Check now** on the shortcut menu that appears.
5. In the **Initiate Integrity Check now** dialog box that appears, select the checks to be performed, whether or not to apply fixes and whether to run the Integrity Check on the StorageServer or MirrorServer.



Notes:

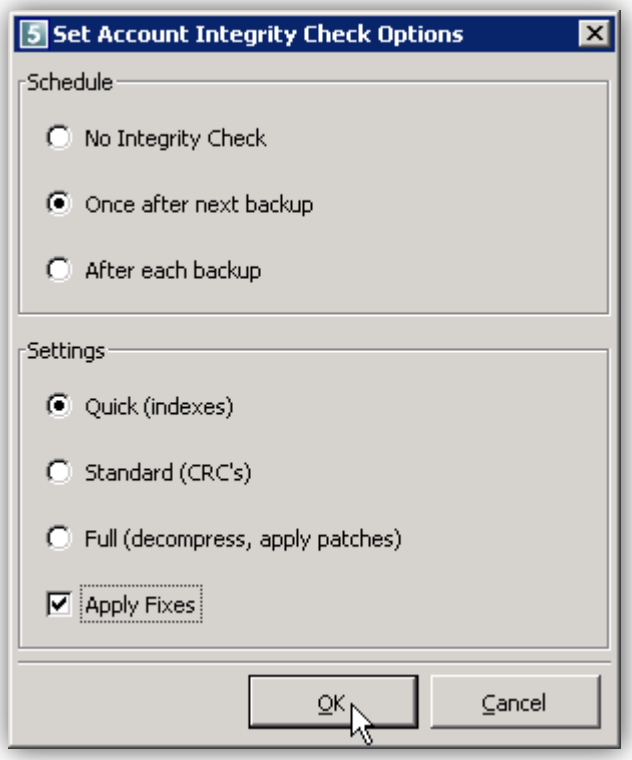
- *The MirrorServer target will be greyed out if the Backup Account's StorageServer or Backup Group is not mirrored.*
- *If you choose to run the Integrity Check on the MirrorServer, you must be logged in to the SP Console with the "admin" account and the MirrorServer must be set to use the Master password and not a Mirror Account.*

6. Click **Start**.

To schedule an Integrity Check:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Backup Account belongs.
2. Ensure that the **Accounts** tab is selected in the work area.
3. In the Accounts list, select the name of the Account on which you wish to perform an Integrity Check.
4. On the **Account** menu, point to **Advanced**, point to **Integrity Checks**, and then click **Schedule an Integrity Check**. Alternatively, right-click the Account name, point to **Advanced**, point to **Integrity Checks**, and then click **Schedule an Integrity Check** on the shortcut menu that appears.
5. Select one of the following options:
   - **Once after next backup**
   - **After each backup**

   *Tip: **After each backup** is less processor intensive than the other options as it will only verify the latest backup and not all available backups on the Storage Platform.*
6. In the **Settings** area, specify the level that should be checked and whether or not fixes should be applied.
7. Click **OK**.



Warnings:

- *Note that the only way for the Integrity Check to fix a problem is to remove the problem file from the backups. If this happens, the Backup Client will receive an error during the next backup which will flag the particular file for a full backup.*
- *Only a small number of Integrity Checks can be run at the same time so some checks may be postponed until the next backup if too many are running.*

Overriding the StorageServer IP

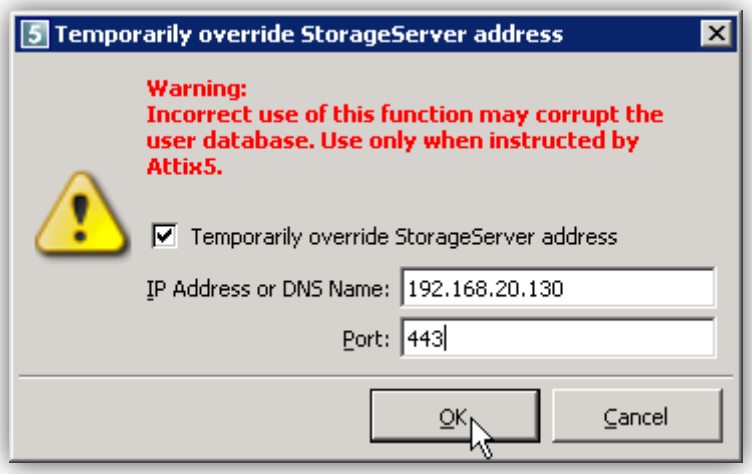
Warning: *Changing the StorageServer IP address will cause ALL Backup Clients that connect to it to use the new address. Incorrect use of this feature may corrupt the user database.*

Note: *You will only see this option if you manage more than one StorageServer with the SP Console.*

Tip: *You can use this feature to back up to a snapshot server. See Preparing a Recovery Server for a Snapshot.*

To override the StorageServer IP:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Backup Account belongs.
2. Ensure that the **Accounts** tab is selected in the work area.
3. In the Accounts list, select the Account(s) you wish to move.
4. On the **Account** menu, point to **Advanced**, and then click **Override StorageServer IP**. Alternatively, right-click the Account name, point to **Advanced**, and then click **Override StorageServer IP** in the shortcut menu.
5. In the **Temporarily override StorageServer address** dialog box that appears, select the **Temporarily override StorageServer address** check box.
6. In the **IP Address or DNS** name box, type the IP address or DNS name of the StorageServer you wish to move the Account to.
7. In the **Port** box, type the port number the SP Console must use to connect to the Storage Platform.
8. Click **OK**.



Warning: *This feature does not move the Account data. It is used when the Account data has already been moved using the Change StorageServer for Accounts feature.*

Access often-used reports

To access often-used Backup Account reports:

1. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Backup Account belongs.
2. Ensure that the **Accounts** tab is selected in the work area.
3. In the Accounts list, right-click the Backup Account(s) whose reports you want to access.
4. Point to **Reports**, and then select the report that you want to access.

Remote Management

You can connect to and administer Attix5 Pro Backup Clients using the Storage Platform Console's Remote Management feature.

Notes:

- *V4.4 is the minimum requirement for Server Edition and v5.0 for Desktop & Laptop Edition Backup Clients.*
- *Remote Management must be enabled in the Backup Client before you can connect to it. (For more information, please refer to the relevant Client User Manual.)*
- *If Multiple Backup Sets are enabled on the Client, only the Default backup set will be accessible using the Remote Management feature.*

Tip: *This feature is especially useful if you do not have GUI access via the Client (e.g. if the Client is installed on a Linux operating system with the GUI feature disabled.)*

Two connection options are available:

- Connect using your Storage Platform Access Account
- Connect using the standard Remote Management username and password

Note: *A user connecting with* Access Account *credentials will only have access to the Remote Management functionality assigned to his/her Role. Users connecting with the standard Remote Management username and password will have full access to all Remote Management functionality. For more information, see Chapter 9, "User Access Management".*

Using this feature, you can initiate backups and restores, modify the backup selection, view log files and configure a number of options ranging from the backup schedule to file exclusions and patching settings.

Connecting to a Backup Account

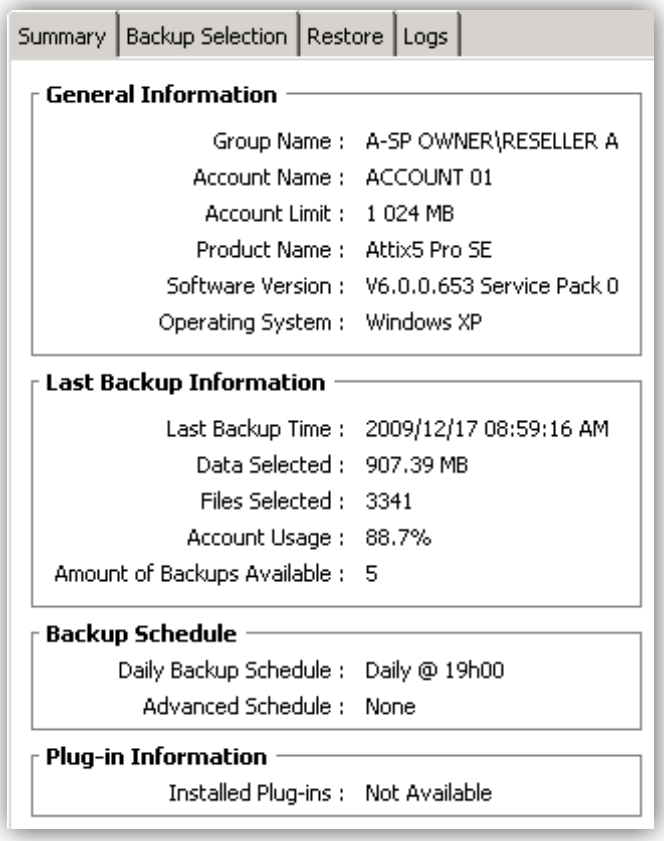
To connect to a Backup Account:

1. Ensure that Remote Management is enabled in the Backup Client. (For more information, please refer to the relevant Backup Client User Manual.)
2. In the Account Management view, expand the Account Management tree and select the name of the Group to which the Backup Account belongs.
3. On the **Account** menu, click **Connect to Backup Client**. Alternatively, double-click the Account name or right-click it, and then click **Connect to Backup Client**.
4. In the **Connect to Backup Client** dialog box that appears, ensure that the correct IP Address and the Storage Platform port number display the boxes provided.
5. Select the type of credentials you wish to use.

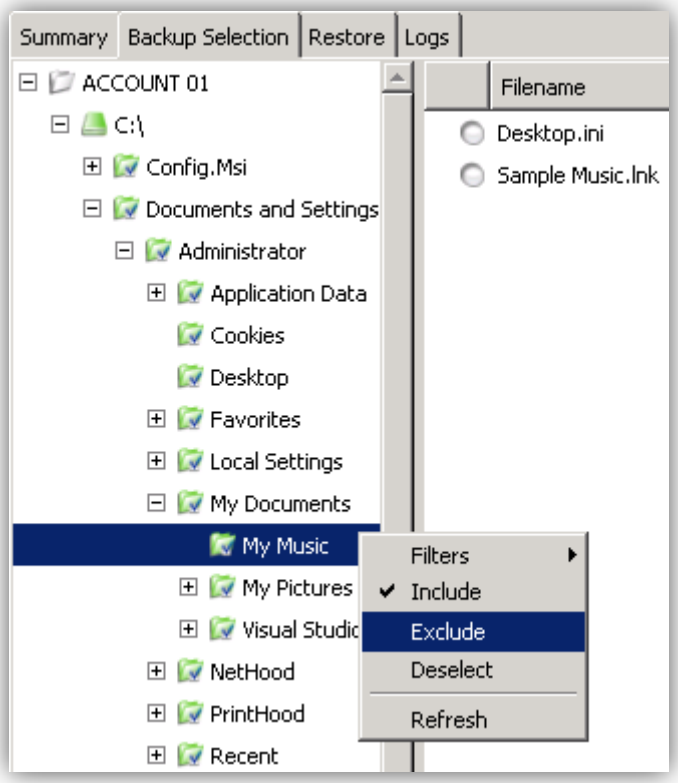
   Notes:
   - *If **Allow SP controlled access** was selected when Remote Management was enabled on the Client, you will be able to use the Storage Platform credentials to connect to the Client.*
   - *If **Allow custom access** was enabled and a particular username and password were specified in the Client, you need to select **Use these credentials** and type those credentials in the boxes provided.*
6. Select **Remember these details** to keep these connection settings configured for your next Remote Management connection.
7. Click **OK**.

Once connected to a Backup Client, four tabs are displayed: **Summary**, **Backup Selection**, **Restore** and **Logs**.

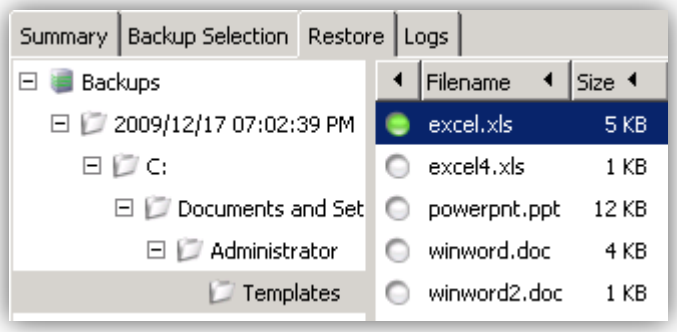
The **Summary** tab displays Backup Account information and configuration settings (a summary of the Backup Client with information ranging from the Account limit, software version and Operating System to the Backup Schedule and installed plug-ins).


Summary
Backup Selection
Restore
Logs
General Information
Group Name : A-SP OWNER\RESELLER A
Account Name : ACCOUNT 01
Account Limit : 1 024 MB
Product Name : Attix5 Pro SE
Software Version : V6.0.0.653 Service Pack 0
Operating System : Windows XP
Last Backup Information
Last Backup Time : 2009/12/17 08:59:16 AM
Data Selected : 907.39 MB
Files Selected : 3341
Account Usage : 88.7%
Amount of Backups Available : 5
Backup Schedule
Daily Backup Schedule : Daily @ 19h00
Advanced Schedule : None
Plug-in Information
Installed Plug-ins : Not Available

You can use the **Backup Selection** tab to modify the backup selection on the remote machine. Right-click the files and/or folders and use the shortcut menus to change their selection statuses. Click the **Backup** button on the main toolbar to initiate the backup process. If the previous backup failed for any reason, the Storage Platform Console will prompt whether the previous backup must be resumed.

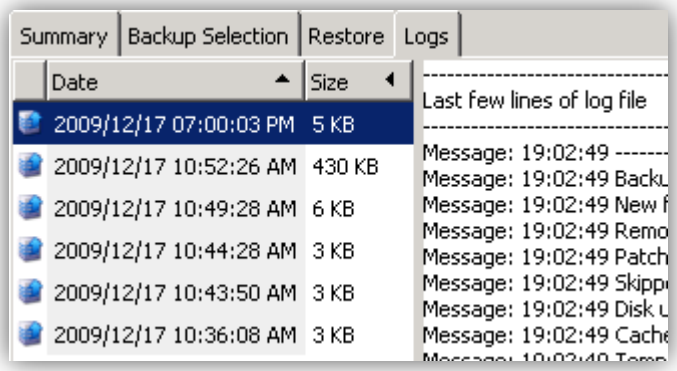


You can use the **Restore** tab to restore files and folders. Select the folders to restore and then click the **Restore** button on the main toolbar to initiate the restore process.



*Tip: While a Backup or Restore process is running, you can use the **Cancel** button to stop the process.*

On the **Logs** tab, you can view Backup and Restore Logs. To view only a summary of the logs, click the **Summary** button on the main toolbar.



Configuring a Backup Account

Warning: *Please read through this section carefully before changing any of the settings. Incorrect settings could cause serious problems or even stop the Backup Client from functioning.*

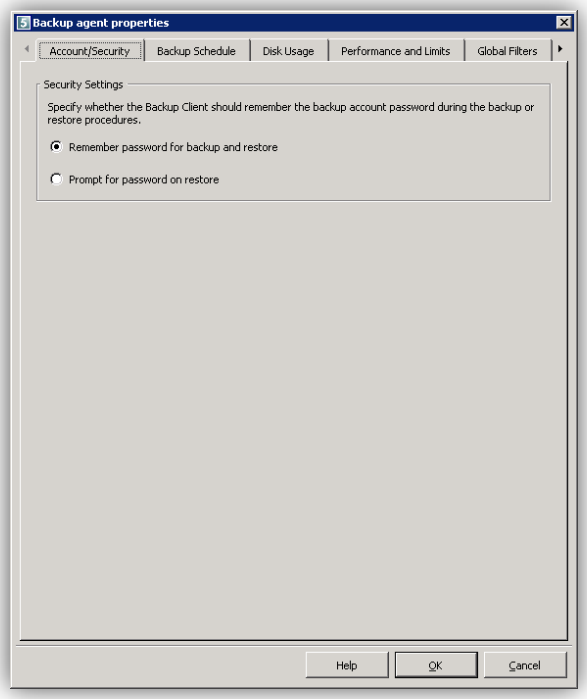
To configure a Backup Client via Remote Management:

1. Click the **Options** button on the main toolbar.
2. In the **Backup Agent Properties** dialog box that appears, configure the tabs as desired. For more information on the tabs available, see sections below.
3. Click **OK**.

Backup Agent dialog box

The **Backup Agent** dialog box provides you with Backup Client properties also available in the Backup Client's **Options and Settings** dialog box. The tabs described below enable you to modify these properties from within the SP Console.

Account/Security tab

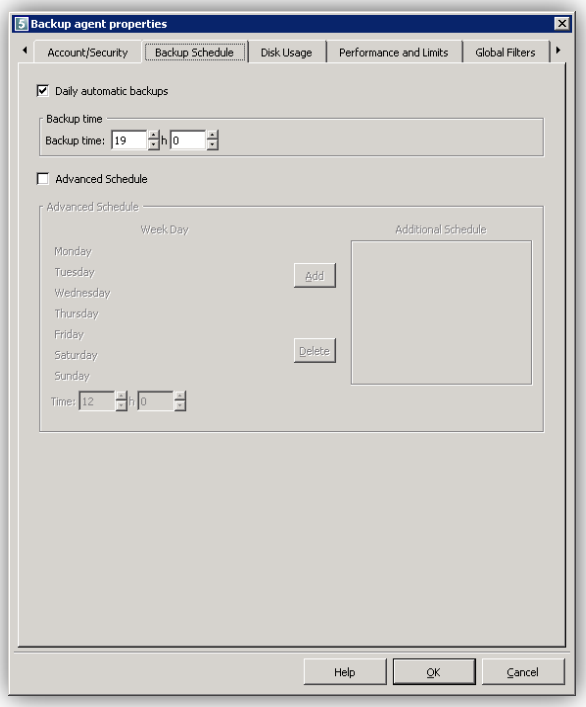


Security Settings

The **Account/Security** tab allows you to select whether or not the Backup Client is to remember the Backup Account password during backups and restores. Two options are available:

- **Remember password for backup and restore:** The Backup Client remembers the user password when doing a backup or restore. This is the default setting.
- **Prompt for password on restore:** The Backup Client prompts for the user password during the restore process.

Backup Schedule tab



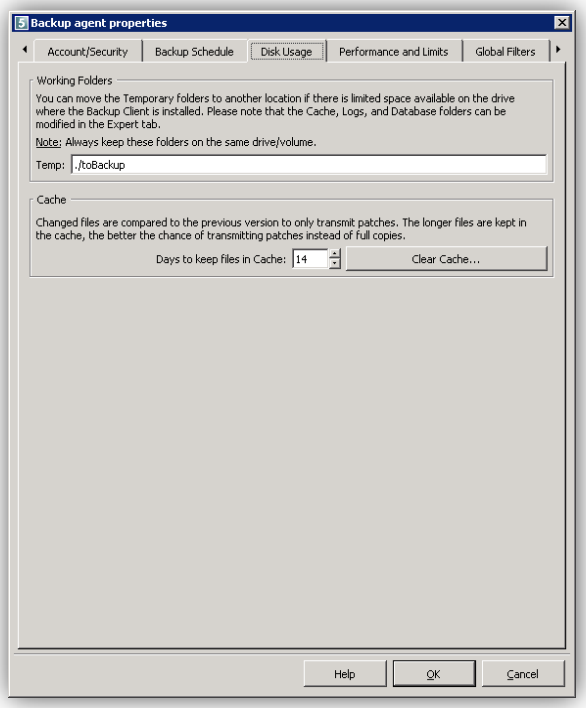
You can modify the backup schedule on the **Backup Schedule** tab. Settings on this tab are identical to those available in the Backup Client's **Options and Settings** dialog box. For more information on configuring backup schedules, please refer to the relevant Backup Client User Manual.

Warning: *You are advised not to disable automatic backups as you will then have to manually initiate all backups.*

Disk Usage tab

You can use the **Disk Usage** tab to change the **Temp** folder location and the number of days that files are to be kept in the cache.

Working Folders


Backup agent properties
Account/Security
Backup Schedule
Disk Usage
Performance and Limits
Global Filters
Working Folders
You can move the Temporary folders to another location if there is limited space available on the drive where the Backup Client is installed. Please note that the Cache, Logs, and Database folders can be modified in the Expert tab.
Note: Always keep these folders on the same drive/volume.
Temp: ./toBackup
Cache
Changed files are compared to the previous version to only transmit patches. The longer files are kept in the cache, the better the chance of transmitting patches instead of full copies.
Days to keep files in Cache: 14
Clear Cache...
Help
OK
Cancel

If there is limited space on the drive where the Backup Client is installed, you can move **Temp** folder, which is used as a temporary workspace for backups and restores, to another location.

Note: ***Cache***, ***Logs*** *and* ***Database*** *folders can be moved using the* ***Expert*** *tab.*

Warnings:

- *The* ***Cache*** *and* ***Temp*** *folders must reside on the same drive/volume.*
- *If the database or any of the folders are stored on a network share, please ensure that the Backup Service has the correct permissions to connect and write to that share.*

Cache

When modifications are made to a file, the Backup Client only transmits changes to that file, as opposed to transmitting the complete file again. This is accomplished by the use of a local cache.

By default, recently modified files are kept in the Cache for 20 days, after which they will be deleted. Once a file has been flushed from the cache, a full copy will be backed up when any modifications are made to the file. The longer files are kept in the Cache, the better the chance of only transmitting patches instead of full copies and thus reducing the amount of data that needs to be transmitted. If there is limited disk space available, consider shortening the time files are kept in the cache.

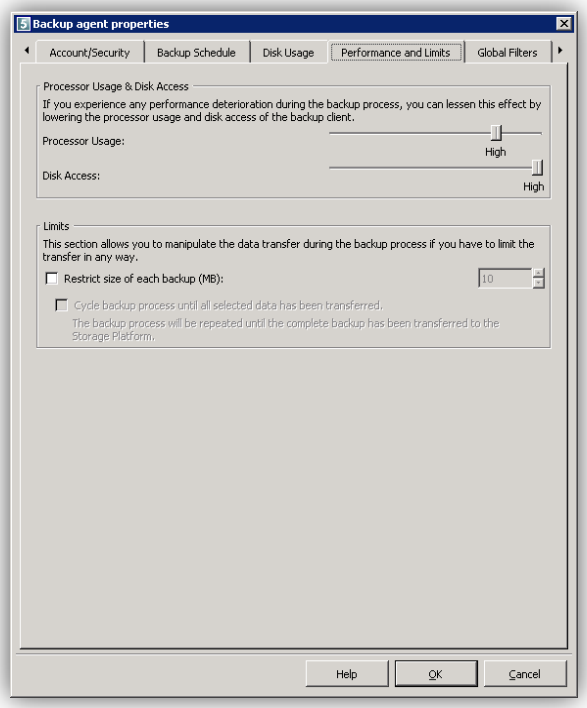
Warning: *If 0 days are specified for caching, patching is disabled. All files in the* ***Cache*** *will be deleted and full copies of changed files will be backed up to the server during each backup.*

To delete the current cache, click the **Clear Cache** button. If the cache is deleted, full copies of the selected files will be re-sent to the Storage Platform during the next backup.

Note: *The Backup Client will log the message* ***Doing monthly cache cleanup*** *once a month. This maintenance task is to ensure that there are no redundant files in the Cache.*

Performance and Limits tab

On the **Performance and Limits** tab, you can change the processor usage, disk access and data transfer limits.


Backup agent properties
Account/Security
Backup Schedule
Disk Usage
Performance and Limits
Global Filters
Processor Usage & Disk Access
If you experience any performance deterioration during the backup process, you can lessen this effect by lowering the processor usage and disk access of the backup client.
Processor Usage:
High
Disk Access:
High
Limits
This section allows you to manipulate the data transfer during the backup process if you have to limit the transfer in any way.
Restrict size of each backup (MB):
10
Cycle backup process until all selected data has been transferred.
The backup process will be repeated until the complete backup has been transferred to the Storage Platform.
Help
OK
Cancel

Processor Usage and Disk Access

The Backup Client uses a fair portion of the available processor power to patch, compress and encrypt files during the backup process. If the computer is being used at the same time, the user may experience some performance deterioration. You can lessen this effect by lowering the Client's processor usage and disk access.

To lower the Backup Client processor usage: Move the **Processor Usage** slider to the left.

Warning: *If the highest **Processor Usage** setting is used, it will affect server performance during the backup.*

To lower the Backup Client disk access: Move the **Disk Access** slider to the left.

Tip: *The process will take longer if this setting is lowered but other disk-intensive applications will perform better.*

Warning: *If the **High** setting is used, the Backup Client will continuously use all available disk access to read and write to the disk. This will, however, ensure that the process completes as fast as possible.*

Limits

You can use the **Limits** tab to limit data transfer speed and/or the size of each backup.

To limit data transfer speed:

1. Select the **Limit outgoing transfer speed (Kbyte/s) to** check box.
2. Type a value in Kbytes/second in the box provided.
3. Click **OK**.

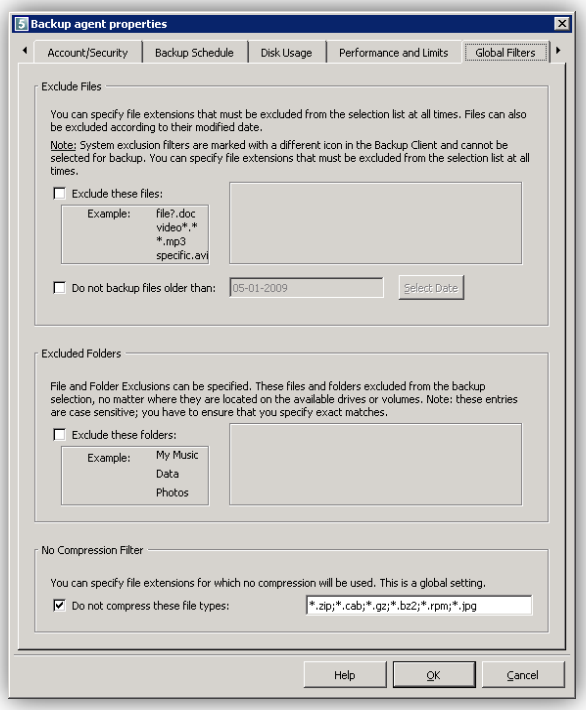
To limit the size of each backup:

1. Select the **Restrict size of each backup (MB)** check box.
2. Type a maximum value amount of data that may be transferred during each backup.
3. If you wish to enable a backup cycle, select **Cycle backup process until all selected data has been transferred**.
4. Click **OK**.

Note: *If this option is enabled, it may take several backups before all files are backed up to the Storage Platform. This feature is especially useful when using a slow Internet connection and there are problems with transferring large backups.*

Global Filters tab

Global Filters enables you to exclude files and/or folders globally and set up a No Compression filter.


Backup agent properties
Account/Security
Backup Schedule
Disk Usage
Performance and Limits
Global Filters
Exclude Files
You can specify file extensions that must be excluded from the selection list at all times. Files can also be excluded according to their modified date.
Note: System exclusion filters are marked with a different icon in the Backup Client and cannot be selected for backup. You can specify file extensions that must be excluded from the selection list at all times.
Exclude these files:
Example: file?.doc video*.* *.mp3 specific.avi
Do not backup files older than:
05-01-2009
Select Date
Excluded Folders
File and Folder Exclusions can be specified. These files and folders excluded from the backup selection, no matter where they are located on the available drives or volumes. Note: these entries are case sensitive; you have to ensure that you specify exact matches.
Exclude these folders:
Example: My Music Data Photos
No Compression Filter
You can specify file extensions for which no compression will be used. This is a global setting.
Do not compress these file types:
.zip;.cab;*.gz;*.bz2;*.rpm;*.jpg
Help
OK
Cancel

Exclude Files

Exclude these files enables you to specify that files with certain file names, extensions or last modified dates be excluded from all backup selections.

*Tip: You can use wildcards. E.g. *.mp3 will exclude all MP3 files from backups.*

Example: To exclude all MP3 and AVI files, type: `*.mp3;*.avi` in the text box. (Separate entries with a semicolon.)

You can also exclude files based on their *last modified* date by selecting the **Do not back up files older than** check box and specifying a date in the box provided.

*Note: The **Date Exclusions** Filter uses the file modify date as a reference and not the file create date.*

Exclude Folders

Exclude these folders enables you to exclude certain folders from all backup selections.

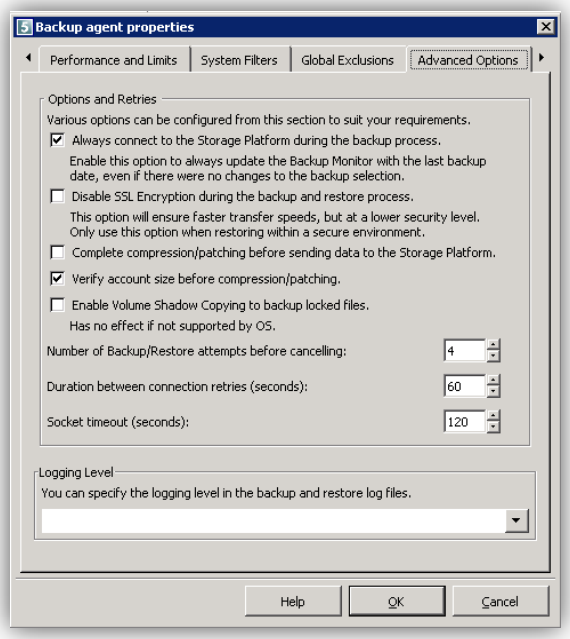
Note: Wildcards are not supported in this area.

No Compression Filter

Compression is not effective on all file types as some files may already be compressed or cannot be compressed at all. The Backup Client could increase processor usage and spend some time trying to compress these files. This filter enables you to specify a list of file extensions that must not be compressed during the backup process. The list of file types specified by default are types known for not compressing well.

Advanced Options tab

Options and Retries


Backup agent properties
Performance and Limits
System Filters
Global Exclusions
Advanced Options
Options and Retries
Various options can be configured from this section to suit your requirements.
Always connect to the Storage Platform during the backup process.
Enable this option to always update the Backup Monitor with the last backup date, even if there were no changes to the backup selection.
Disable SSL Encryption during the backup and restore process.
This option will ensure faster transfer speeds, but at a lower security level. Only use this option when restoring within a secure environment.
Complete compression/patching before sending data to the Storage Platform.
Verify account size before compression/patching.
Enable Volume Shadow Copying to backup locked files.
Has no effect if not supported by OS.
Number of Backup/Restore attempts before cancelling:
4
Duration between connection retries (seconds):
60
Socket timeout (seconds):
120
Logging Level
You can specify the logging level in the backup and restore log files.
Help
OK
Cancel

Always connect to the Storage Platform...
When the **Always connect to the Storage Platform** check box is selected, the Backup Client will connect to the Storage Platform during each backup, whether or not changes were made. This updates the last backup date stamp, even if there were no changes made to the backup set, ensuring that the Storage Platform always reflects the latest backup date.

Complete compression/patching before sending data to the Storage Platform
During the backup process, Attix5 Pro SE compresses and patches files and places them in a queue to be transmitted. This queue allows transmission and compression/patching to occur in parallel, reducing the total backup time significantly.

Select this option to disable multiple thread backups. This option is typically needed when using a dial-up account. With this setting enabled, the Backup Client will compress all new files and patch all modified files before starting to transmit data to the Storage Platform.

Verify account size before compression/patching
With this setting enabled, the Backup Client verifies the Backup Account size limit on the Storage Platform before starting with the compression and/or patching. It is useful to flag Account limit issues before starting these possibly time-consuming processes.

Enable Volume Shadow Copying to back up locked files

Microsoft Volume Shadow Copy Service (VSS) provides a solution by creating a snapshot of the data at any given point in time without any interruption to any applications. Using this option enables the backup of open or locked files.

Warning: *Please use relevant plug-ins to back up databases.*

Use VSS to update the cache

Using this option will increase the speed of the cache update process.

Warning: *This setting will increase the load on VSS and may cause VSS to fail on servers with heavy I/O (like file servers), resulting in cache update failures.*

Number of Backup/Restore attempts before cancelling

By default, the Backup Client tries to connect to the Storage Platform 4 times before cancelling the backup process. It is advised to increase the number of attempts when using a slow Internet connection. The backup will continue from the previous point of failure and not resend the entire backup.

Duration between connection retries

By default, if the connection is dropped, the Backup Client will try to reconnect to the Storage Platform after 60 seconds. This setting enables the Backup User to increase/decrease the duration between the retries.

Socket Timeout

The default socket timeout is 60 seconds. If the Backup Client is connected to the Storage Platform and there is no communication between the two, the time specified in this box (in seconds) is how long the Backup Client will stay connected before dropping the connection.

Logging Level

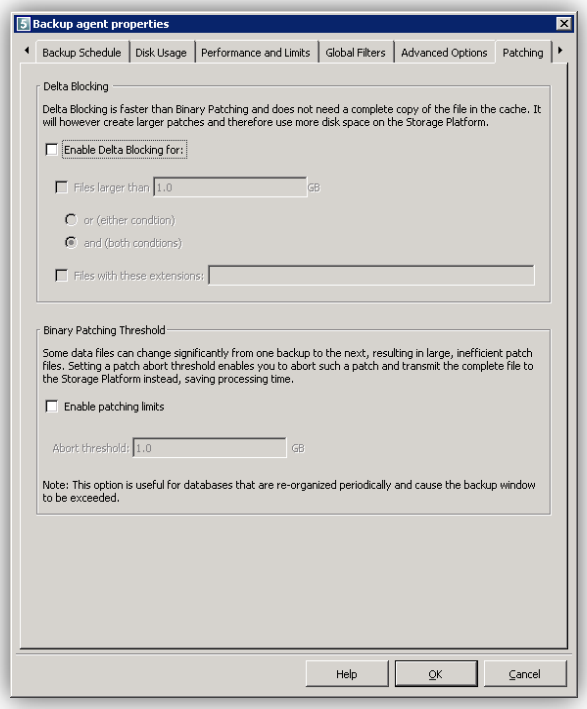
You can specify the level of information that must be included in the log files. Choose between:

- Log all messages
- Suppress detail
- Log errors and warnings

Patching tab

Patching is the process of extracting only the differences between files. This process minimizes the amount of data that has to be transferred to the Storage Platform. There are two types of patching available: Binary Patching (enabled by default) and Delta Blocking.

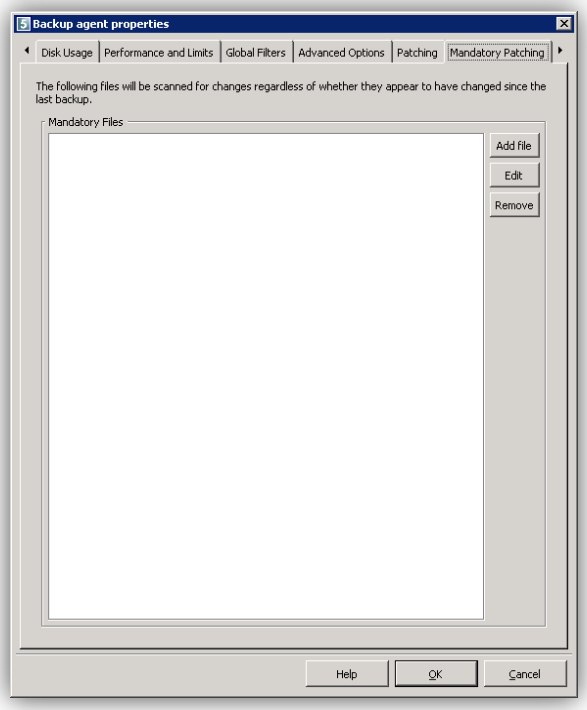
If you are not accustomed with this functionality, please refer to the Client User Manual for additional information before changing these settings.


Backup agent properties
Backup Schedule
Disk Usage
Performance and Limits
Global Filters
Advanced Options
Patching
Delta Blocking
Delta Blocking is faster than Binary Patching and does not need a complete copy of the file in the cache. It will however create larger patches and therefore use more disk space on the Storage Platform.
Enable Delta Blocking for:
Files larger than 1.0 GB
or (either condition)
and (both conditions)
Files with these extensions:
Binary Patching Threshold
Some data files can change significantly from one backup to the next, resulting in large, inefficient patch files. Setting a patch abort threshold enables you to abort such a patch and transmit the complete file to the Storage Platform instead, saving processing time.
Enable patching limits
Abort threshold: 1.0 GB
Note: This option is useful for databases that are re-organized periodically and cause the backup window to be exceeded.
Help
OK
Cancel

Mandatory Patching tab

A file is considered modified if the timestamp or size changes. The Backup Client can, however, be configured to patch certain files and folders regardless of whether or not they appear to have changed since the last backup.

Files selected for mandatory patching display on the Client's **Backup Selection** tab with a green icon containing the letter "M": Ⓜ.



Note: Files selected for mandatory patching can be excluded by the Backup Client user. For more information, please refer to the Client User Manual.

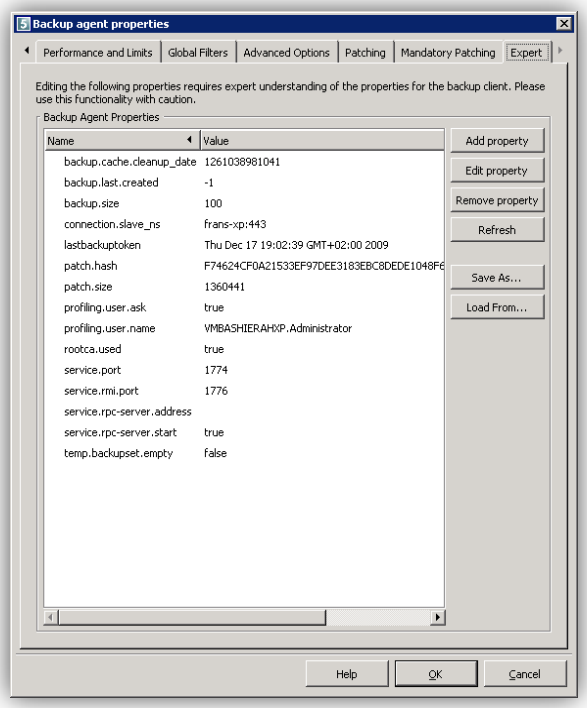
Tip: Mandatory Patching is especially useful in situations where files are held open by an application (internally the file changed, but the change is not reflected in the last modified date on the file system or in the size of the file itself).

To select files for mandatory patching:

1. Click the **Add file** button.
2. In the **Add file** dialog box that appears, type the name of the file.
3. Click **OK** to save the settings.

Expert tab

The **Expert** tab contains all variable settings not found on any of the other Backup Client configuration tabs. These entries are saved in the **a5backup.properties** file and the file also includes plug-in settings, if installed.



> ***Warning:*** *Please use this tab with caution. Incorrect use may alter the backup and restore procedures.*

Use the buttons on the right to **Add**, **Edit** or **Remove** properties. Settings can be imported and exported by using the **Save As** and **Load From** buttons, and the **Refresh** button will update the Backup Client Properties section with any recent changes.

Backup Client Updates

Updating Backup Clients manually can be a time consuming exercise. Attix5 Pro allows you to automate this process. Desktop & Laptop Edition and Server Edition can be updated automatically with the latest software version and service pack during the backup process.

Notes:

- *Desktop & Laptop Edition (DL) v3.x/4.x Backup Clients cannot automatically be updated to version 5 due to the infrastructure change from an application to a service. It will continue to function as normal. To update the DL Client, you need to uninstall the old version manually and then install the new version and reconnect to the existing Backup Account. For more information, please contact your support team.*
- *In Server Edition, this functionality is available for v4.1 Backup Clients and higher.*

Attix5 creates *update packs* that are distributed to the various AccountServers. The AccountServer then distributes these packs to the different Backup Clients as they are requested during the backup process.

Notes:

- *Backup Clients are always updated to the latest version and service pack available on the Storage Platform.*
- *If the version is too old to be updated, the update must be done manually. (However, please refer to the previous note before attempting to do so. Update instructions can be found later in this chapter.)*
- *The* update pack *is packaged into one file per Storage Platform.*
- *A separate update for each brand and operating system is created. If you have different branded Backup Clients connecting to your Storage Platform, they will be updated with their own branding.*

Enabling Auto Updates

You can enable Auto Updates for the complete Storage Platform or per Collection or Group.

Notes: Please note that you need to configure Auto Updates before you can enable them. For more information, see Backup Client Updates *in Chapter 6, "Account Management".*

Warnings:

- *If a plug-in has been deprecated, the Backup Client will only be updated to the latest version in which the plug-in was still supported.*
- *Attix5 Pro V7 does not support the PowerPC architecture on Mac. Backup Clients on Macs using the PowerPC architecture will only be updated to the latest version available prior to V7.*

To enable Auto Updates for the complete SP:

1. Access the Storage Platform Configuration view by clicking the **Storage Platform Configuration** button in the view selector.
2. Click the AccountServer node in the Storage Platform Configuration tree and then click the **Configure** button on the toolbar. Alternatively, right-click the AccountServer node and then click **Configure**.
3. Navigate to the **Updates** tab and select the **Auto-update Backup Client** check box. Ensure that the **Update File Search Path** is correct and then click **OK**.

Auto Updates are now enabled. Since all Backup Groups are set to use the Storage Platform's default Auto Update setting by default, Auto Updates are now enabled for all Backup Groups.

To enable Auto Updates at Collection/Group level:

1. Access the Account Management view by clicking the **Account Management** button in the view selector.
2. Select the Collection or Backup Group name and then click the **Configure** button on the toolbar. Alternatively, right-click the Collection or Group name and then click **Configure**.
3. Click the **Updates** tab and then select the applicable **Auto Update Backup Client** option.

Configuring Auto Updates

Note: Please ensure that you have received the update pack from Attix5 before you begin the following procedure.

Should you change the update pack location, you need to configure the AccountServer Update File Search Path by following the instructions below.

To configure Auto Updates on the Storage Platform:

1. In the SP Console's Storage Platform Configuration view, select the AccountServer node.
2. On the **AccountServer** menu, click **Configure**. Alternatively, right-click the AccountServer node, and then click **Configure** on the shortcut menu that appears.
3. In the **Configure AccountServer** dialog box that appears, navigate to the **Updates** tab and ensure that the **Auto-update Backup Client** check box is selected.
4. Type the new file location in the **Update File Search Path** box.
5. Click **OK**.

The AccountServer will extract the update pack and create the update structure in the specified folder.

Desktop & Laptop Edition update process

Please refer to the note at the beginning of this chapter related to version 4 Backup Clients.

If Auto Update is enabled, the Storage Platform verifies the Desktop & Laptop Client version when it connects to the Storage Platform during the backup process. If a Backup Client is running an older (auto-update supported) version of the software, the update is made available and the Desktop & Laptop Client will download and install the update automatically.

Server Edition update process

Server Edition Backup Clients from version 4.1 onwards can be updated to the latest version automatically.

Note: You need to update the Server Edition Backup Clients to v4.4 in order to use the Remote Management functionality available in the v4.4 Storage Platform Console.

To manually update SE Backup Clients and their plug-ins:

1. Close the Backup Client application interface and the SE system tray icon.
2. Run the SE Installer.

> *Note: The SE Installer retrieves the install location from the backup service and cannot be changed as you are upgrading an existing SE Client.*

3. On the **Welcome** screen, click **Next**.
4. On the **Ready to install Attix5 Pro SE** screen that appears, click **Install**.
5. If the Attix5 Pro SE service is running, a **Files in Use** wizard screen will appear. Click **OK** to have the installer stop the service, update the software and then restart the service. If the SE service is not running at the point of update, the installer will update the software and start the service thereafter automatically.
6. On the **Completion** screen that displays, **Launch Backup Client SE** is selected by default. Clear the check box if you do not wish to do so.
7. If you have the plug-in installer file in the same directory as the new Backup Client installer file, a **Launch Plug-in Installer** check box will display above the **Launch Backup Client SE** check box on the **Completion** screen. If you wish to add or update any plug-ins at this point, ensure that the check box is selected.

> *Note: If the plug-in install file is not in the same location as the Backup Client install file, you can manually update installed plug-ins by running the plug-in installer at a later stage. Existing plug-ins are marked with a blue icon and will automatically be updated when you click **Next**. The plug-ins can also be updated automatically during the next backup process.*

8. After the Backup Client and plug-in updates (if applicable), click **Finish**.
9. Confirm that you can open the SE Backup Client and initiate a backup to the Storage Platform.

All activities described above are displayed in the Diagnostics area of the Storage Platform Console.

Plug-in Auto Update process

During the backup process, the Storage Platform will compare the plug-in versions received from the Backup Client with the latest versions available on the Storage Platform. If newer versions are available, the Backup Client will be able to download the files and automatically update the installed plug-ins.

Deployment Wizard

The Deployment Wizard is used to create a single installation file (MSI) that can be preconfigured with file selections and backup permissions to install **Desktop & Laptop Edition** or **Server Edition** Backup Client software on a computer.

Warning: *Certain antivirus programs may result in deployment failures. In such cases, you may need to disable antivirus scanning for the duration of the deployment process.*

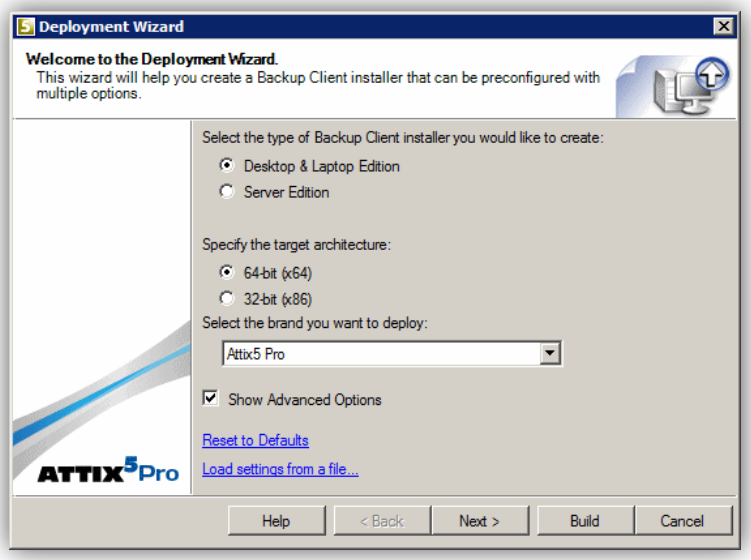
Creating a Backup Client deployment file

To create a deployment file for a Backup Group:

1. In the Account Management view, expand the Storage Platform Collection in the Account Management tree.
2. Right-click the name of the Backup Group to which the new Backup Accounts will belong, and then click **Deploy**.
3. The Deployment Wizard will be initiated. Follow the wizard steps described below to create the deployment file. A custom MSI installer will be built according to your wizard selections.

Step 1 of 11: Start the Deployment Wizard and specify the initial settings

1. Select the type of Backup Client installer that you wish to create. Desktop & Laptop Edition is selected by default.


Deployment Wizard
Welcome to the Deployment Wizard.
This wizard will help you create a Backup Client installer that can be preconfigured with multiple options.
Select the type of Backup Client installer you would like to create:
Desktop & Laptop Edition
Server Edition
Specify the target architecture:
64-bit (x64)
32-bit (x86)
Select the brand you want to deploy:
Attix5 Pro
Show Advanced Options
Reset to Defaults
Load settings from a file...
ATTIX5 Pro
Help
< Back
Next >
Build
Cancel

2. Select **64-bit** or **32-bit** as the target architecture.

> ***Warning:*** *Please note the following and ensure that you configure the MSI installer for the correct architecture:*
> - *64-bit installers cannot run on 32-bit operating systems. However, 32-bit installers can run on 64-bit operating systems.*
> - *System State and Exchange plug-ins can only function with 64-bit SE Backup Clients running on 64-bit operating systems.*

> ***Note:*** *If you have access to multiple branded Backup Clients, you will be able to choose which brand to deploy during this step. The brands available depend on the brands that your Access User has been given access to. Admin users have full access to all brands on the Storage Platform.*

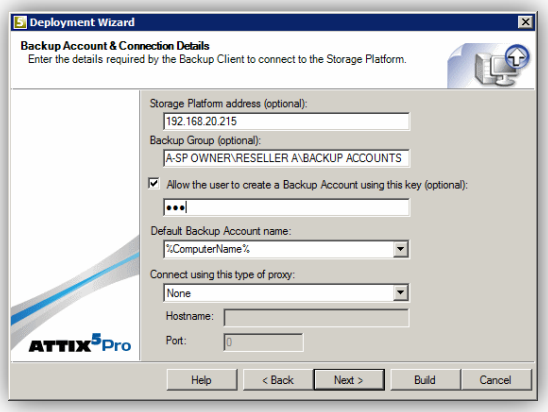
3. Select the **Show Advanced Options** check box if you wish to view the Deployment Wizard's advanced options.

> ***Notes:***
> - *The **Reset to Defaults** option at the bottom of the Deployment Wizard will reset all settings currently populated to the default settings.*
> - ***Load settings from a file...** enables you to load settings from a previously created deployment file (you have the option to save the settings in an xml file for future use in the final step of the Deployment Wizard).*

4. Click **Next** to continue to the next step, or **Build** to start the build process.

Step 2 of 11: Specify the Backup Account and connection details

1. Specify the correct Storage Platform and Backup Group details.



> ***Note:*** *If you initiated the Deployment Wizard from within the Storage Platform Console, these entries will already be populated with the correct settings. If you leave these entries blank, the Backup Account Setup Wizard will prompt the user for the details.*

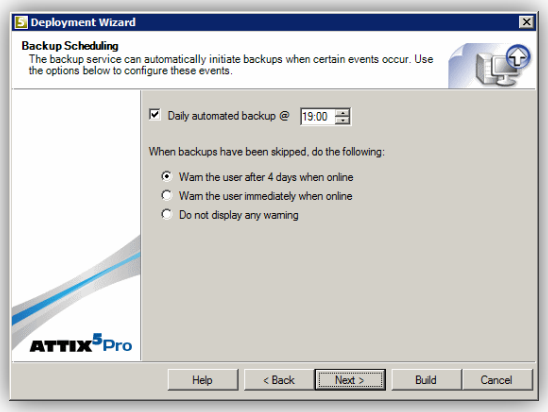
> ***Warning:*** *Please ensure that you enter the correct settings, or the Backup Client will not be able to function correctly.*

2. If you wish to disable the creation of new Backup Accounts, deselect the **Allow the user to create a Backup Account using this key** check box. The Backup Client will then only allow reconnects to existing Backup Accounts available on the Storage Platform.

> ***Note:*** *The **Default Backup Account name** box allows you to specify whether the Backup Account name in the Backup Account Setup Wizard must be automatically populated with the computer name, user name, user domain, or any combination of the standard parameters, e.g. %UserDomain%-%UserName%. You can also specify the variable for the default Backup Account name. The Deployment Wizard supports all variables that can be found by typing "set" in the Command Prompt.*

3. If necessary, specify proxy settings in the boxes provided.
4. Click **Next** to continue to the next step, or **Build** to start the build process.

Step 3 of 11: Configure backup scheduling

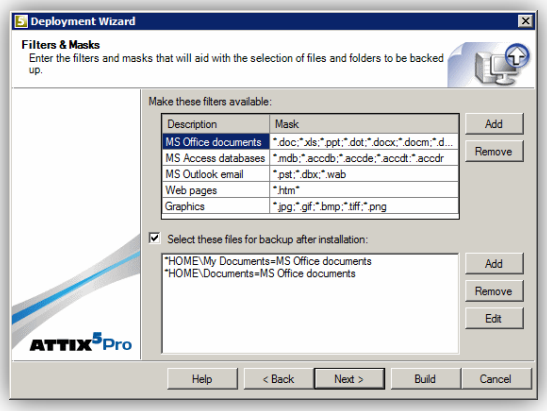

Deployment Wizard
Backup Scheduling
The backup service can automatically initiate backups when certain events occur. Use the options below to configure these events.
Daily automated backup @ 19:00
When backups have been skipped, do the following:
Warn the user after 4 days when online
Warn the user immediately when online
Do not display any warning
ATTIX5 Pro
Help
< Back
Next >
Build
Cancel

1. Specify a time for the daily automated backup. The default backup time is 19h00.

   > ***Warning:*** *Automatic backups can be disabled, but the end-user will then have to manually initiate backups which is* ***not recommended****.*

2. Desktop & Laptop Edition Backup Clients can warn the user if backups were skipped by displaying a popup message whenever a network connection is detected. Select what action the Backup Client should take if a backup is skipped. Warn the user after 4 days when online is the default selection, to accommodate offline periods that typically occur during weekends.
3. Click **Next** to continue to the next step, or **Build** to start the build process.

Step 4 of 11: Define default selection filters

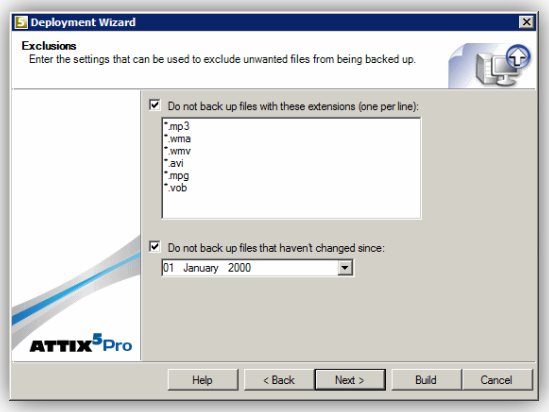


1. Use the **Add** and **Remove** buttons to specify the default selection filters that will be available in the Backup Client.
2. Enable the **Select these files for backup after installation** check box to apply some of the abovementioned filters when the Backup Client is opened for the first time. Use the **Add**, **Remove** and **Edit** buttons to configure the filter types that you want to include in the Backup Client's initial backup selection.

   > *Note: *HOME\ refers to the logged in user's home folder.*

3. Click **Next** to continue to the next step, or **Build** to start the build process.

Step 5 of 11: Specify exclusions



1. If you wish to stop certain file types from being backed up, select the **Do not backup files with these extensions (one per line)** check box and type the file extensions to be excluded in the box provided.

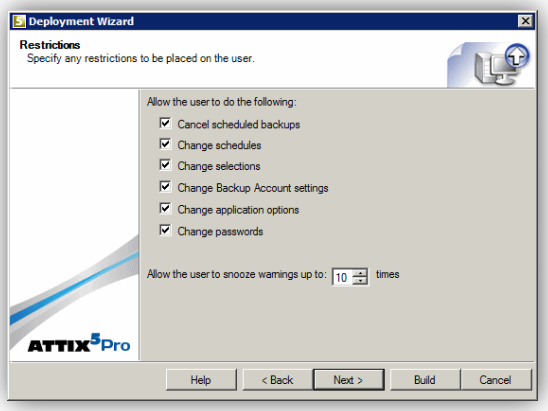
   Note: Type each extension on a new line in the format: `*.file`.

2. To prevent the backup of files that have not been modified recently, select the **Do not backup files that haven't changed since** check box, and then select a date.
3. Click **Next** to continue to the next step, or **Build** to start the build process.

*Note: The exclusions specified above are marked in the Backup Client as **Excluded by Administrator** and take priority over the backup selection made by the end-user.*

Step 6 of 11: Specify restrictions (DL advanced option)

Note: This step is only available when deploying a DL Backup Client.

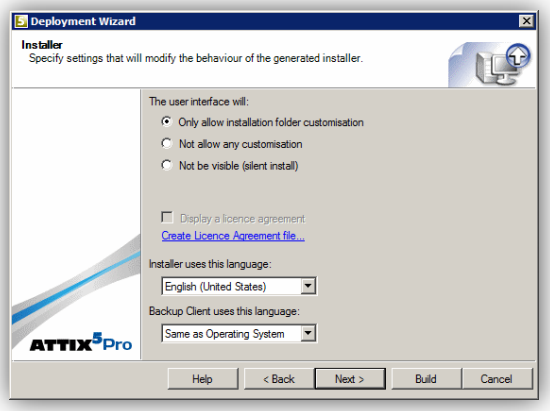


1. Modify users' ability to cancel or change scheduled backups, change backup selections, change Backup Account settings, change application options and/or change passwords by selecting or deselecting the respective check boxes.
2. Click **Next** to continue to the next step, or **Build** to start the build process.

Step 7 of 11: Specify restrictions (Advanced option)

1. Modify the behaviour of the MSI installer by selecting the level of customisation that the end-user will be allowed to perform during the install process.

   *Note: If you select **Not be visible**, you must have administrator privileges when running the installer or the installation will fail. This option causes the installation to run in the background. (See "Step 9 of 11: Configure custom Backup Client settings" for instructions on configuring the MSI properties so that the Backup Account name, password and encryption key are installed without user input.)*



2. Click **Create Licence Agreement file...** to create a licence agreement. After you have created a licence agreement, you can choose to display it in the installer wizard by selecting the **Display a licence agreement** check box.

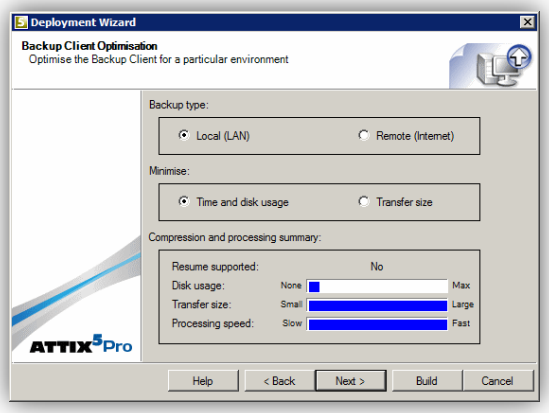
   *Note: If the Deployment Wizard detects a **Licence.rtf** file in **C:\Users\{User}\AppData\Roaming\Deployment**, the **Create Licence Agreement file...** link changes to **Edit Licence Agreement file...**.*

3. Click **Next** to continue to the next step, or **Build** to start the build process.

Step 8 of 11: Set environment optimisation (SE advanced option)

Note: This step is only available when deploying an SE Backup Client.

1. Select **Local (LAN)** or **Remote (Internet)** as the backup type. The default is Local (LAN). This option determines whether the Backup Client will be optimised to use Streaming Backup.
2. You can choose to minimise backup time and disk usage, or transfer size. The default is Time and disk usage.
3. Click **Next** to continue to the next step, or **Build** to start the build process.

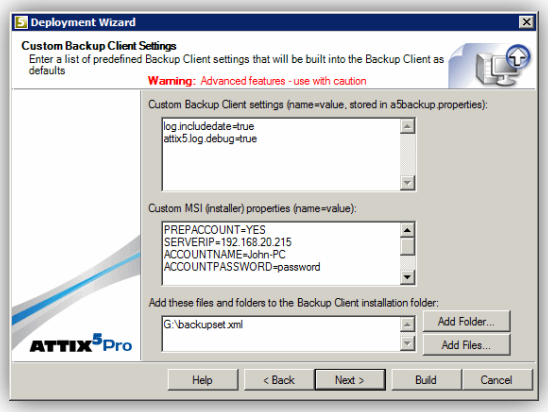


Note: The compression and processing summary displays the outcome of the choices you have made, with regards to support for resuming interrupted backups, disk usage, transfer size and processing time. The default selections optimise the Backup Client for backing up over a local network with network traffic not being an issue.

Step 9 of 11: Configure custom Backup Client settings (Advanced option)

Warning: *This step contains advanced features that could corrupt the functioning of the Backup Client. Please consult your Backup Administrator before configuring these settings.*

1. Specify any custom Backup Client settings that should be stored in the a5backup.properties file.



> ***Note:*** *Settings specified here will* ***not*** *override existing settings if you* ***manually update*** *the Backup Client using this deployment. The settings will only take effect if you perform a clean install or if the setting is new to the version being deployed.*

> ***Example:*** *To pre-configure the Backup Client so that backup and restore logs include the date, and the service log includes debug messages, type the following in the* ***Custom Backup Client settings...*** *box:*
>
> ```
> log.includedate=true
> attix5.log.debug=true
> ```

2. In the **Custom MSI (installer) properties...** box, if you wish to add properties to the MSI file, type each property on a new line.

> ***Example:*** *To pre-configure the MSI properties so that the Backup Client installs with the AccountServer IP: "192.168.20.215", the Backup Account name: "John-PC", the Backup Account password: "password", the Backup Group create key: "pas", the encryption key: "password" and the Backup Group: "A-SP OWNER\RESELLER A\BACKUP ACCOUNTS", type the following in the* ***Add these properties...*** *box:*
>
> ```
> PREPACCOUNT=YES
> SERVERIP=192.168.20.215
> ACCOUNTNAME=John-PC
> ACCOUNTPASSWORD=password
> CREATEKEY=pas
> ACCOUNTKEY=password
> GROUP=A-SP OWNER\RESELLER A\BACKUP ACCOUNTS
> ```

Note: The encryption key must be 8 characters or more.

3. To specify additional folders or files to be added to the MSI file when built, e.g. the **backupset.xml** file with a default selection, click the **Add Folder** or **Add Files** button, navigate to and select the items to add, and then click **Open**.

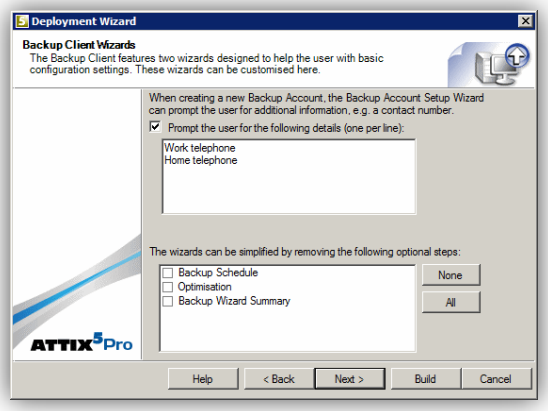
   ***Warning:** Files and folders added in this step will overwrite any existing files found in the installer. Please be careful when using this feature as you may corrupt the Backup Client when replacing files.*

   Notes:
   - *To add a folder to the Backup Client you must include its parent folder in this step.*
   - *The contents of the selected folders are added to the installer.*

4. Click **Next** to continue to the next step, or **Build** to start the build process.

Step 10 of 11: Configure Backup Client wizards (Advanced option)

1. If you wish to specify any mandatory custom fields in a separate step in the Backup Account Setup Wizard, select the **Prompt the user for the following details (one per line)** check box and then type the names of the fields in the box provided, listing them on separate lines.

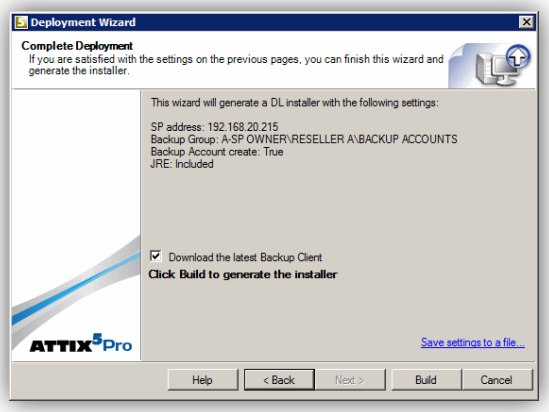

Deployment Wizard
Backup Client Wizards
The Backup Client features two wizards designed to help the user with basic configuration settings. These wizards can be customised here.
When creating a new Backup Account, the Backup Account Setup Wizard can prompt the user for additional information, e.g. a contact number.
Prompt the user for the following details (one per line):
Work telephone
Home telephone
The wizards can be simplified by removing the following optional steps:
Backup Schedule
Optimisation
Backup Wizard Summary
None
All
ATTIX5 Pro
Help
< Back
Next >
Build
Cancel

   Note: The supplied values are stored in the AccountServer database and can be viewed in the SP Console.

2. To simplify the Backup Client wizards for the end user, you can remove optional steps from them.
3. Click **Next** to continue to the next step, or **Build** to start the build process.

Step 11 of 11: Build

1. Select whether to download the latest Backup Client from the Storage Platform.


Deployment Wizard
Complete Deployment
If you are satisfied with the settings on the previous pages, you can finish this wizard and generate the installer.
This wizard will generate a DL installer with the following settings:
SP address: 192.168.20.215
Backup Group: A-SP OWNER\RESELLER A\BACKUP ACCOUNTS
Backup Account create: True
JRE: Included
Download the latest Backup Client
Click Build to generate the installer
Save settings to a file...
ATTIX5 Pro
Help
< Back
Next >
Build
Cancel

> ***Note:*** *If this check box is not selected, the Deployment Wizard will use the Backup Client that it currently has. If it does not have a Backup Client, the wizard will download it from the Storage Platform regardless of whether the check box is selected or not.*

2. Confirm all the settings and then click **Build** to start the build process.
3. The Deployment Wizard will prompt you for the folder where the created MSI file must be stored. Your Desktop is the default location.
4. Once the MSI has been built, you can choose to open the Deployment folder on exit from the Deployment Wizard.
5. Click **Close**. The Deployment Wizard will save the current deployment settings before closing. The next time you open the Deployment Wizard, your settings will be automatically populated.

MSI Installer

The Attix5 Pro MSI installer enables you to remotely deploy Server Edition and Desktop & Laptop Edition Backup Clients using your preferred desktop management solution, e.g. Microsoft SMS. Use the Deployment Wizard to include the AccountServer and Group settings in the MSI. With these settings populated, you can specify that the Backup Account must be created automatically during the install process.

Use the following command to run the installer (ensure that you have administrator privileges):

```
./BackupClientFileName.msi PREPACCOUNT=Yes
```


If you do not wish to use the preconfigured AccountServer and Backup Group details, you can use additional parameters to override the default settings configured:

- **SERVERIP** – IP address of the AccountServer
- **ACCOUNTNAME** – Backup Account name
- **ACCOUNTPASSWORD** – Backup Account password.

  Note: If you do not specify a Account password, a random one will be used.

- **CREATEKEY** – Backup Group Create Key
- **ACCOUNTKEY** – Backup Account encryption key.

  Note: If you do not specify an encryption key, a random one will be used.

- **GROUP** – Backup Group name

Tips for using Environment Variables:

- *You can use Environment Variables to supply the parameters listed above.*
- *Type "`set`" in the command prompt to view a list of variables you can use.*
- *You can use these properties as fixed values or use templates based on the variables (e.g. `./BackupClientFileName.msi PREPACCOUNT=Yes ACCOUNTPASSWORD=%USERDOMAIN%`).*
- *You can also use a combination of variables (e.g. `./BackupClientFileName.msi PREPACCOUNT=Yes ACCOUNTPASSWORD=%USERDOMAIN%\%USERNAME%`).*

The standard MSI parameters are also available. A few examples are:

- `/help` – Help information
- `/quiet` – Quiet mode, no user interaction
- `/passive` – Unattended mode, progress bar only

Example: To deploy the Server Edition Backup Client, run the following with administrator privileges:

```
...\A5BPSE5.0.msi PREPACCOUNT=YES SERVERIP=SERVERNAME
GROUP=COLLECTION01\GROUP01 CREATEKEY=KEY021 /passive /quiet
```

MSI Notes:

- Attix5 Pro will use the Windows Computer Name as the Backup Account name.
- The password and encryption keys are randomly selected during the Backup Account creation process.
- You are advised to install a Group Certificate to the specific Groups as the encryption keys are random. Without this certificate you will not be able to connect to a Backup Account to restore any data, should the computer crash. The password can be changed in the Storage Platform Console.

Chapter 7: Storage Platform Configuration

Depending on your backup requirements, you can configure the Storage Platform to consist of only the essential components:

- An AccountServer
- At least one StorageServer

Or you can include additional components:

- A Slave AccountServer
- Additional StorageServers
- MirrorServers

The Storage Platform Configuration view in the SP Console enables you to manage all these components.

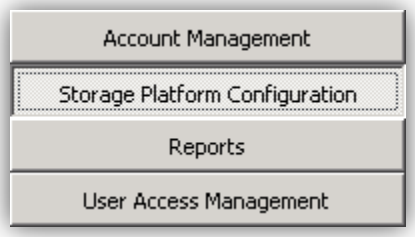
Storage Platform Configuration view

In the Storage Platform Configuration view, you can administer the following Storage Platform components:

- **AccountServers**
- **StorageServers**
- **Slave AccountServers**
- **MirrorServers**

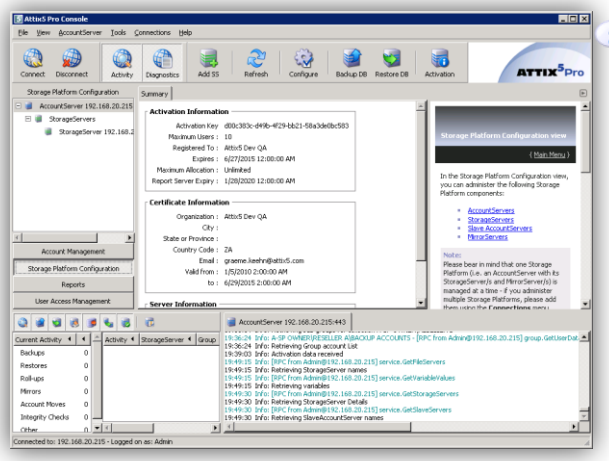
*Note: Please bear in mind that one Storage Platform (i.e. an AccountServer with its StorageServer/s and MirrorServer/s) is managed at a time - if you administer multiple Storage Platforms, please add them using the **Connections** menu. For more information, see Connecting to a Storage Platform in Chapter 4, "Connection".*

To access the Storage Platform Configuration view:



1. Open the SP Console and connect to the Storage Platform. [See Chapter 4, "Graphical User Interface (GUI)".]
2. In the view selector on the left of the SP Console, click the **Storage Platform Configuration** button.

The AccountServer **Summary** tab displays by default. This tab provides you with an overview of activation, certificate and server information and displays a unique *Activation Key*.



*Note: If you need to reinstall the Storage Platform, e.g. during a disaster recovery process, the Activation Key will enable you to install and start the Storage Platform services without any correspondence with Attix5, as was previously required with the **activation.txt** file. **Please ensure that you store this key in a safe place, as it is your reference on the LicenceServer.***

Storage Platform Configuration view icon legend		
Icon	**Location**	**Description**
	Storage Platform Configuration tree	AccountServer node
	Storage Platform Configuration tree	StorageServers/StorageServer node

When a StorageServer node is selected, the following columns are visible in the StorageServers tab:

- **Address** – IP address of the StorageServer.
- **Version** – Version of the StorageServer.
- **Online** – The StorageServer is either online or offline.
- **Disk Size** – The storage capacity of the StorageServer's data volume.
- **Free Space** – The amount of free space on the StorageServer's data volume.
- **Disk Usage** – The percentage of the StorageServer's capacity being utilised.
- **On Disk** – The amount of disk space used to store all backups for all Backup Accounts on the StorageServer (excluding index files).
- **Data Protected (last backup)** – The amount of uncompressed data being protected by the StorageServer for the last backup of all the Backup Accounts. This value could be larger than the **On Disk** value due to various reasons, including: SIS and patching.
- **Data Protected (all backups)** – Sum of uncompressed data protected over all backups for all Backup Accounts.
- **Saving** – Saving due to compression, patching, local de-duplication (within a Backup Account), and global de-duplication (across all Backup Accounts).
- **Saving %** – Saving as a percentage of Data Protected (all backups).
- **Server Locked** – The StorageServer is either locked or unlocked. New Accounts cannot be created on a locked StorageServer.

To view server information:

In the Storage Platform Configuration tree, click the server name. A summary of the certificate and server information displays on the **Summary** tab.

*Note: You can access any configurable options by clicking the **Configure** button on the toolbar. Alternatively, right-click the server name and then click **Configure**.*

LicenceServer

The AccountServer periodically connects to the global LicenceServer to receive available licence updates, as requested. It will automatically download updated certificates, expiry dates, and Backup Client and plug-in licence updates as soon as they are issued by your software provider and the Attix5 team.

For more information on the AccountServer's activation information, see *Viewing activation information* in Chapter 6, "Storage Platform Management".

Monitoring servers

The servers in a Storage Platform handle many tasks, including:

- Backups
- Restores
- Roll-ups
- Mirroring (a method of backing up the backups)
- Account moves
- Integrity checks

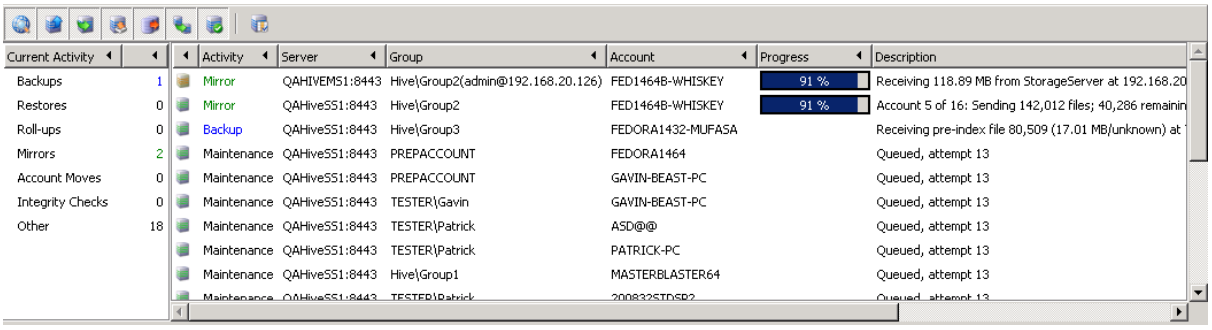
Viewing a server's activity

Sometimes, you may wish to see what is happening on a server at a particular point or what is queued to happen in the near future. You can do this in the Storage Platform Configuration view of the console.

To view the tasks being performed on a server:

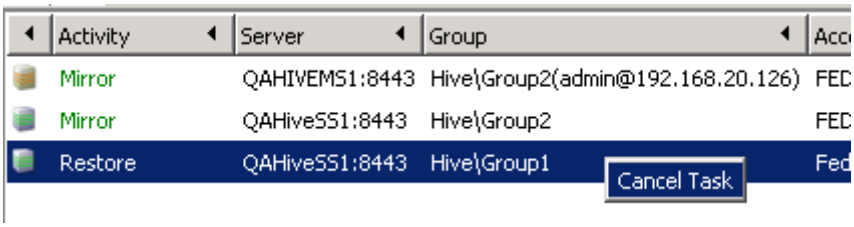
1. Click the **Storage Platform Configuration** button in the view selector.
2. Expand the AccountServer node.
3. Navigate to the server you wish to monitor (e.g. **Storage > StorageServer123**).
4. Ensure that the **Activity** button is depressed in the main toolbar:

5. In the Activity area, you'll be able to see all current and queued tasks for the selected server:


Current Activity
Backups 1
Restores 0
Roll-ups 0
Mirrors 2
Account Moves 0
Integrity Checks 0
Other 18
Activity Server Group Account Progress Description
Mirror QAHIVEMS1:8443 Hive\Group2(admin@192.168.20.126) FED1464B-WHISKEY 91 % Receiving 118.89 MB from StorageServer at 192.168.20
Mirror QAHiveSS1:8443 Hive\Group2 FED1464B-WHISKEY 91 % Account 5 of 16: Sending 142,012 files; 40,286 remainin
Backup QAHiveSS1:8443 Hive\Group3 FEDORA1432-MUFASA Receiving pre-index file 80,509 (17.01 MB/unknown) at
Maintenance QAHiveSS1:8443 PREPACCOUNT FEDORA1464 Queued, attempt 13
Maintenance QAHiveSS1:8443 PREPACCOUNT GAVIN-BEAST-PC Queued, attempt 13
Maintenance QAHiveSS1:8443 TESTER\Gavin GAVIN-BEAST-PC Queued, attempt 13
Maintenance QAHiveSS1:8443 TESTER\Patrick ASD@@ Queued, attempt 13
Maintenance QAHiveSS1:8443 TESTER\Patrick PATRICK-PC Queued, attempt 13
Maintenance QAHiveSS1:8443 Hive\Group1 MASTERBLASTER64 Queued, attempt 13

Cancelling a task

You can cancel a task in progress or one that is queued by right-clicking the task entry in the Activity area and then clicking **Cancel Task** in the shortcut menu that appears:



Click the **Show All** button if all activities are not displayed.

Filter activities to only display a particular Backup Group(s) – Use the **Filter by Group** button on the toolbar.

View/hide/filter activity stream

You can view/hide information by selecting or deselecting the Activity buttons:

All activities on all servers

Backup activity

Restore activity

Roll-up activity

Mirroring activity

Account move activity

Integrity Check activity

Monitor logs

Another way to monitor server tasks is to view the server logs. These provide you with more detail than the Activity area.

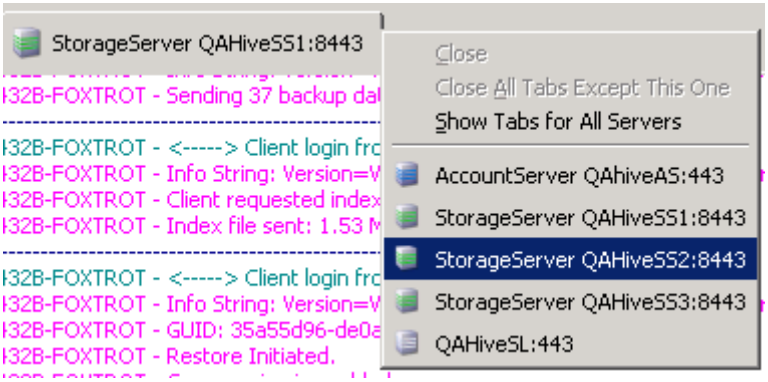
To access a server's log messages:

1. Ensure that the **Storage Platform Configuration** button is selected in the view selector.
2. Expand the AccountServer node.
3. Navigate to the server you wish to monitor (e.g. **Storage > StorageServer123**).
4. Ensure that the **Diagnostics** button is depressed in the main toolbar:

5. In the Diagnostics area, you'll be able to see all of the selected server's log messages in a tab dedicated to that server:

Tips:

- *If you select to view another server's log messages, it will open a new tab for that server in the Diagnostics area but the previously viewed tab will still be available.*
- *To open/close tabs from within the Diagnostics area: Right-click one of the tab headings and select the server you wish to monitor:*



AccountServer

The AccountServer is used to manage Backup Groups and to administer individual Backup Account settings. It also authenticates Accounts for the backup and restore processes, and controls load balancing when multiple StorageServers are used. The AccountServer uses port 443 for all incoming connections.

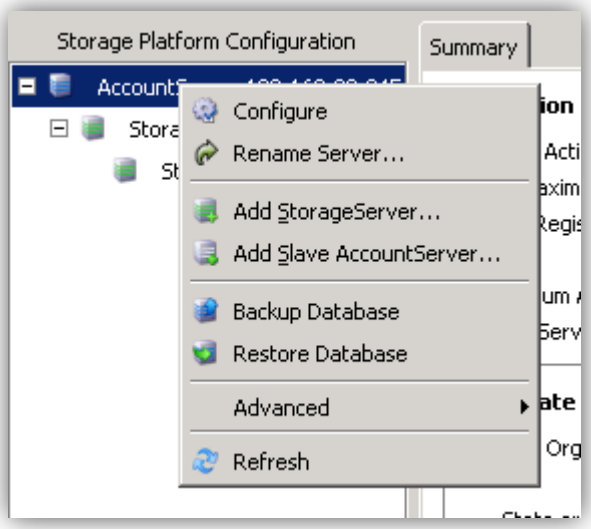
You can perform the following actions on the AccountServer using the SP Console:

- **Configure the server**
- **Rename the server**
- **Add a Slave AccountServer**
- **Back up/Restore the AccountServer database**
- **Update licence information (Advanced)**
- **View activation information (Advanced)**
- **Change master password (Advanced)**
- **Restart the AccountServer service (Advanced)**

All of the actions listed above are initiated using the AccountServer actions menu.

To access the AccountServer actions menu:

1. Open the Storage Platform Console.
2. Click the **Storage Platform Configuration** button in the view selector.
3. Right-click the AccountServer name in the Storage Platform Configuration tree to view the options available in the AccountServer. Alternatively, click the **AccountServer** menu on the menu bar.



The menu that appears enables you to configure the AccountServer settings, add StorageServers and Slave AccountServers, back up the AccountServer database, Restore the AccountServer database, update the licence information, view activation information, change the Master password, and refresh the above-mentioned components. For detailed descriptions of the menu items, see *Special menus and toolbar buttons* in Chapter 4, “Graphical User Interface (GUI)”.

Configuring an AccountServer

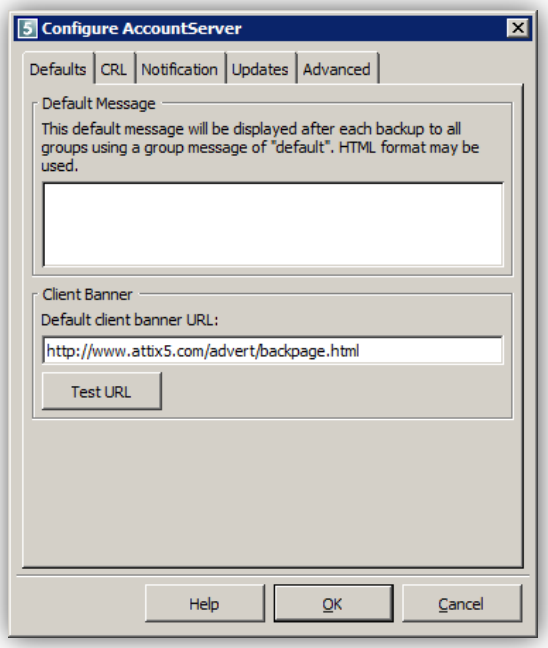
You can configure the AccountServer using the **Configure AccountServer** dialog box.

To access the Configure AccountServer dialog:

1. Ensure that the AccountServer name is selected in the Storage Platform Configuration tree.
2. Click the **Configure** button on the toolbar. Alternatively, right-click the AccountServer name in the Storage Platform Configuration tree and then click **Configure**.
3. In the **Configure AccountServer** dialog box that appears, you can click any of the available tabs to view or modify the settings. For more information, see below.

Configure AccountServer dialog box

Defaults tab



Default Message

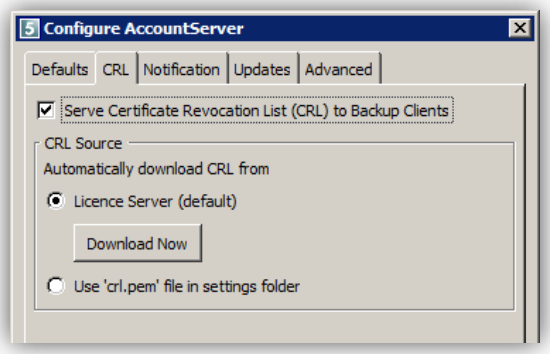
You can use the Default Message area to specify a message to be displayed on the Desktop & Laptop Edition Backup Client summary screen after each backup. All Backup Groups with "Default" set as their Group Message will use this message.

Default Client Banner URL

You can use this box to display an advert or banner (dimensions: 468 x 60 pixels) in the Client after each backup. Specify the URL where the banner will be hosted. This URL will be sent to all groups with "Default" specified as their Client Banner URL. The Client Banner URL should point to an HTML file with the following format:

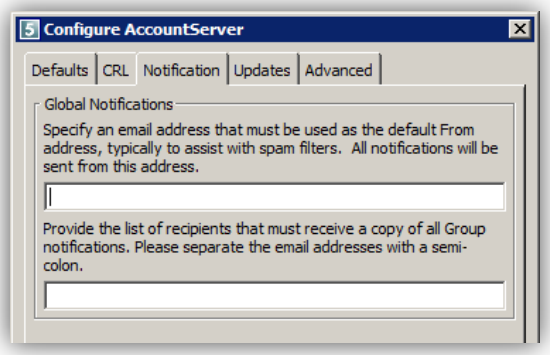
```
<HTML>
<CENTER>
<A HREF="http://link here">
<IMG SRC="Image here" BORDER=0 WIDTH=468 HEIGHT=60></A>
</CENTER>
</HTML>
```

CRL tab



You can choose whether or not the AccountServer should serve a CRL (Certificate Revocation List) by selecting or clearing the **Serve Certificate Revocation List (CRL) to Backup Clients** check box.
If a CRL is to be served, you can download the list from the LicenceServer or use the **crl.pem** file in the settings folder.

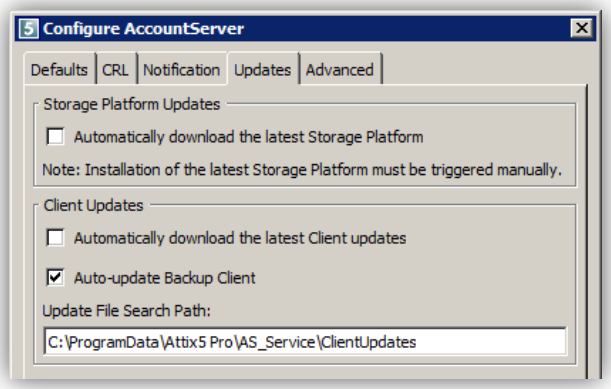
Notification tab


Configure AccountServer
Defaults
CRL
Notification
Updates
Advanced
Global Notifications
Specify an email address that must be used as the default From address, typically to assist with spam filters. All notifications will be sent from this address.
Provide the list of recipients that must receive a copy of all Group notifications. Please separate the email addresses with a semi-colon.

The AccountServer can send system wide notifications to a list of specified email addresses. Backup Group Over Limit warnings, Mirror Done and StorageServer Down notification messages will be sent using this email address.

You can also specify a global "From" email address for all SP notifications in this section (this assists with spam filters).

Updates tab



Storage Platform Updates

In the Storage Platform Updates area, you can choose whether to download the latest Storage Platform as it becomes available on the UpdateServer. If you enable this option, you will be notified in the SP Console whenever an updated Storage Platform is available. You can then choose whether to update the Storage Platform or not.

Client Updates

In the Client Updates area, you can choose to download the latest Backup Client updates automatically. If you enable this option, the Storage Platform will automatically download and apply the latest Backup Client updates as they become available from the UpdateServer. The latest Backup Clients can then be deployed.

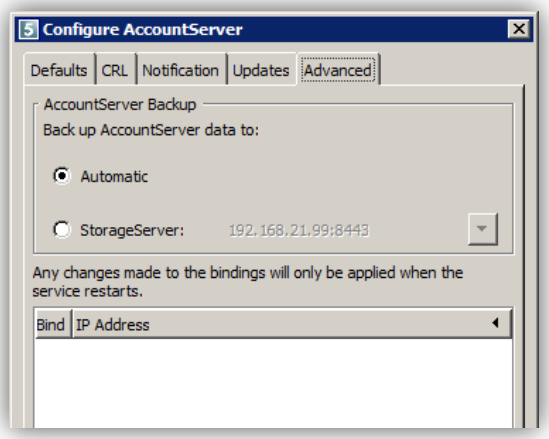
You can also choose to enable auto-updates for the Backup Client. If you enable this option, Backup Clients will be updated to the latest software version automatically during the next backup. Specify the location of the Backup Client update pack in the **Update File Search Path** box (the default location is displayed).

Advanced tab

You can use this tab to configure the AccountServer database backup settings.

AccountServer Backup

In the AccountServer Backup area, you can select whether the SP Console should back up AccountServer data to the default backup server or to another StorageServer.



Bindings

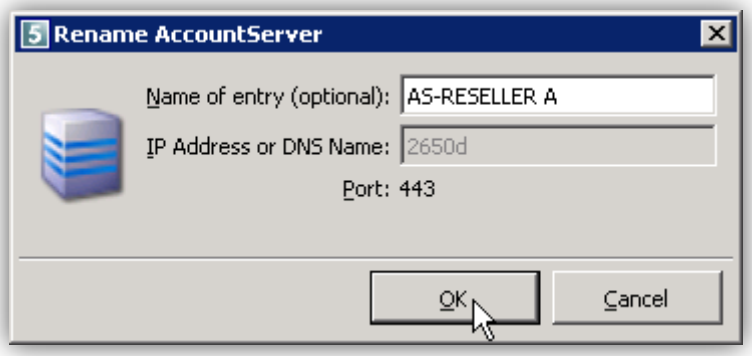
In the Bindings area, you can select which IP address the AccountServer will bind to.

Note: This option will only be enabled if more than one IP address is available. Restart the service to apply any changes.

Renaming an AccountServer

To rename an AccountServer:

1. In the Storage Platform Configuration tree, click the AccountServer name.
2. On the **AccountServer** menu, click **Rename Server**. Alternatively, right-click the AccountServer name in the tree and then click **Rename Server** on the shortcut menu.
3. In the **Rename AccountServer** dialog box that appears, type a new display name in the **Name of entry** box, and then click **OK**.



Adding a Slave AccountServer

You can install an additional AccountServer to act as a slave to the master AccountServer and then add a connection to it in the SP Console. For more information, see "AccountServer" later in this chapter.

For more information on installing a Slave AccountServer, please refer to the Storage Platform User Manual, and then see "Slave AccountServer" later in this chapter.

Note: The Slave AccountServer option must be enabled on the LicenceServer with the correct Activation Key.

Backing up/restoring an AccountServer database

You can back up the AccountServer database manually or schedule automatic backups at particular times and you can restore the database at any time. See below for details.

> ***Note:*** *By default, the ReportServer database is not backed up with the AccountServer database. For information on how to back up the ReportServer database with the AS database, see* Backing up a ReportServer database *in Chapter 8, "Reports".*

Automated backups

The AccountServer database, which contains the Backup Group and User tables, is automatically backed up to the StorageServer every 60 minutes. This automated process enables you to restore a database not older than 60 minutes from the StorageServer, should the AccountServer database fail for any reason. Activity is logged in the AccountServer and StorageServer Diagnostics areas. The AccountServer logs the message: "*Backing up database to StorageServerIPAddress*" when the database backup starts and "*Database backed up to StorageServerIPAddress*" when the process is complete. After the StorageServer has received the database, it will log the message: "*Backup database received*".

> ***Tip:*** *It is advisable to mirror the StorageServer to an offsite location, especially if the AccountServer and StorageServers are running on the same machine, to ensure that it can be restored if the Storage Platform fails. The AccountServer database is part of the data that is mirrored to the remote MirrorServer. In the case of an AccountServer and StorageServer failure, the StorageServer will have to be recovered from the MirrorServer before you can restore the AccountServer database from the StorageServer.*

Manual backups

Although AccountServer database backups are run automatically every 60 minutes, you can initiate manual backups at any point in time.

To manually initiate the AccountServer backup procedure:

1. Click the AccountServer name in the Storage Platform Configuration tree.
2. Click the **Backup DB** button on the main toolbar. Alternatively, right-click the AccountServer name and then click **Backup Database**.
3. In the confirmation dialog box that appears, click **Yes**. The Diagnostics area will log the progress of the backup, ending with: "*Info: Backed up recovery information to StorageServer at <IP address>*" if successful.

Database restores

To restore the AccountServer database:

1. In the Storage Platform Configuration tree, click the AccountServer name.
2. Click the **Restore DB** button on the toolbar. Alternatively, right-click the AccountServer name and then click **Restore Database**.

Note: All existing data in the AccountServer database will be overwritten by the restore. The backed up database will be recovered from the StorageServer. Thereafter, the AccountServer will restart itself to refresh all settings.

Advanced actions

You can perform advanced actions from the menu bar or by right-clicking the **AccountServer** node in the Storage Platform Configuration tree, pointing to **Advanced** in the shortcut menu, and then clicking an action menu item.

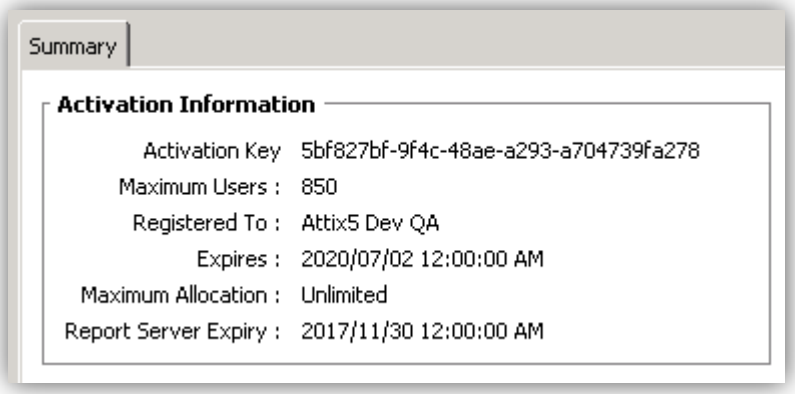
Updating licence information

To update the AccountServer's licence information:

1. In the Storage Platform Configuration tree, click the **AccountServer** name.
2. On the **AccountServer** menu, point to Advanced, and then click **Update Licence Info**. Alternatively, right-click the AccountServer name, point to **Advanced**, and then click **Update Licence Info**.

The SP Console will connect to the LicenceServer and retrieve the latest activation data. The following message will be logged in the AccountServer's Diagnostics area:

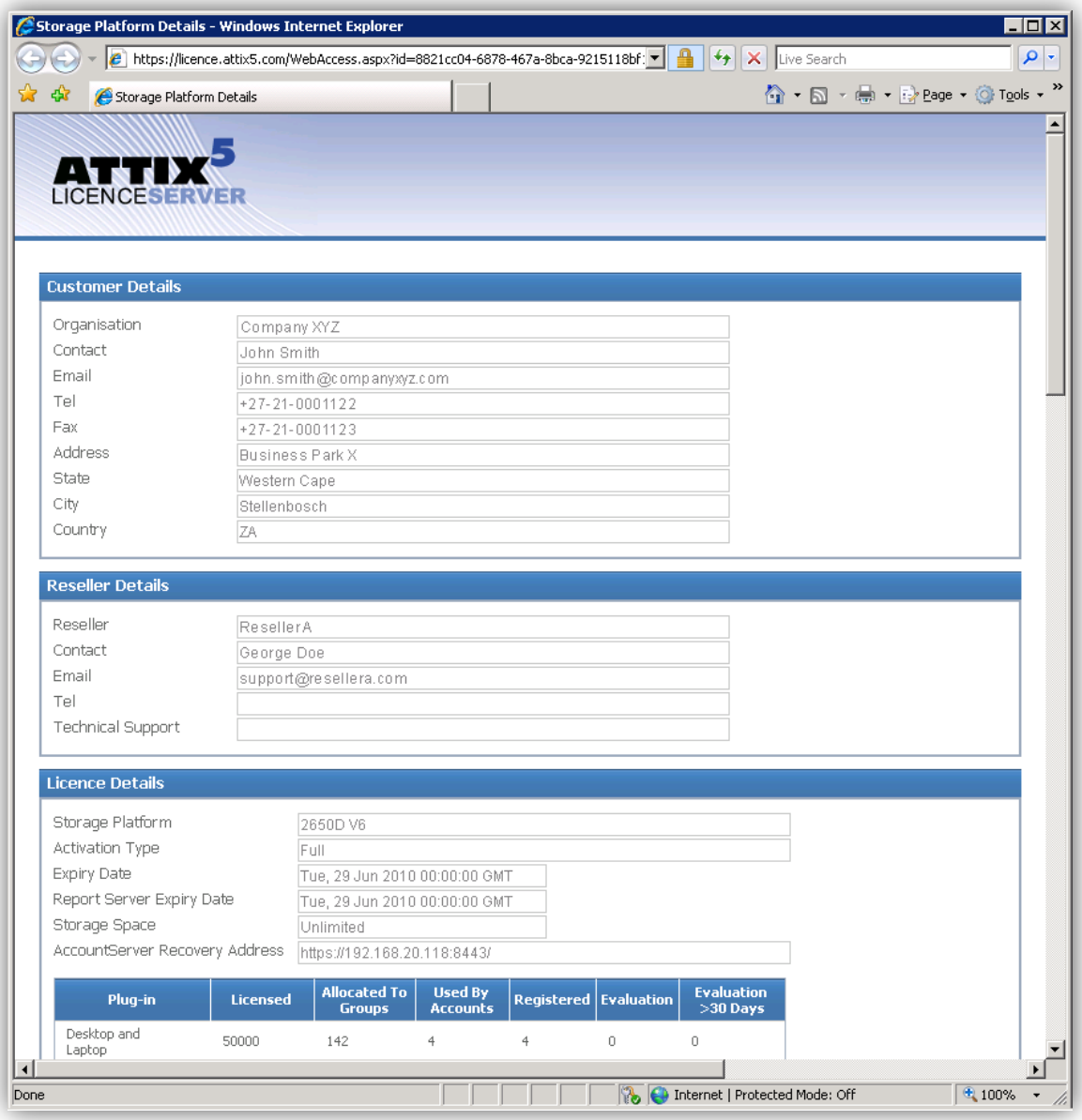
The Activation Information area on the AccountServer's **Summary** tab will also be updated.


Summary
Activation Information
Activation Key 5bf827bf-9f4c-48ae-a293-a704739fa278
Maximum Users : 850
Registered To : Attix5 Dev QA
Expires : 2020/07/02 12:00:00 AM
Maximum Allocation : Unlimited
Report Server Expiry : 2017/11/30 12:00:00 AM

Viewing activation information

To view activation information:

In the Storage Platform Configuration view, click the **Activation** button on the main toolbar. An online page displaying the LicenceServer activation information displays.

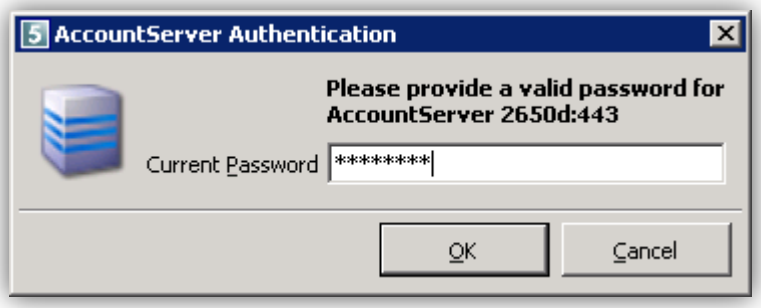


Note: Only people with the unique Activation Key will be able to view this page. It includes your details, as well as your reseller, licence and configuration details.

Changing the master password

To change the master password:

1. In the Storage Platform Configuration tree, click the **AccountServer** name.
2. On the **AccountServer** menu, point to **Advanced**, and then click **Change Master Password**. Alternatively, right-click the AccountServer name, point to **Advanced**, and then click **Change Master Password**.
3. In the **AccountServer Authentication** dialog box that appears, type the current password in the box provided.



> ***Warning:*** *The master password is the password for the AccountServer, StorageServer(s) and MirrorServer(s). Please ensure that you wish to change the password for all these servers before you continue.*

4. Click **OK**.
5. In the **Change Master Password** dialog box that appears, type a new password in the **Password** and **Re-type password** boxes.
6. Click **OK**.

Restarting the AccountServer service

To restart the AccountServer service:

1. In the Storage Platform Configuration tree, right-click the AccountServer name, point to **Advanced**, and then click **Restart Service**.
2. In the confirmation dialog box that appears, click **Yes**.

Slave AccountServer

The AccountServer database information is periodically sent to the Slave AccountServer and a copy is made. A Backup Client will always try to connect to the master AccountServer initially, but in the event of the master being unavailable, it will connect to the slave for authentication.

You can install a Slave AccountServer using the Storage Platform Installation Wizard (for more information, please refer to the Storage Platform User Manual).

Using the SP Console, you can connect to and perform the following Slave AccountServer actions:

- **Add/Remove the server**
- **Configure the server**
- **Rename the server**
- **Back up/Restore the server database**
- **Restart the Slave AccountServer Service**

Adding and removing Slave AccountServers

To add to a Slave AccountServer:

1. Install the Slave AccountServer using the Storage Platform Installation Wizard. (For more information, please refer to the Storage Platform User Manual.)
2. In the Storage Platform Configuration tree, click the AccountServer name.
3. On the **AccountServer** menu, click **Add Slave AccountServer**. Alternatively, right-click the AccountServer name and then click **Add Slave AccountServer** on the shortcut menu.
4. In the **Add Slave AccountServer** dialog box that appears, type the server details in the boxes provided.
5. In the **One Time Password** box, type the password provided to you during the server installation.

   *Tip: Should you forget the OTP provided during installation, you can access it in the **Settings.xml** file located in **%appdata%\Attix5 Pro\SS_Service**.*
   It is the first 8 characters of the <ServerGuid> entry.
   *I.e. <ServerGuid>**83470821**-caec-482c...*

6. Click **OK**.

A Slave AccountServer node will display beneath the master AccountServer node in the Storage Platform Configuration tree. You can now configure the Slave AccountServer as described in "Configuring Slave AccountServers" later in this chapter.

To remove a Slave AccountServer:

1. In the Storage Platform Configuration tree, select the Slave AccountServer name.
2. On the **Slave AccountServer** menu, click **Remove Server**. Alternatively, right-click the Slave AccountServer name and then click **Remove Server** on the shortcut menu.
3. In the confirmation dialog box that appears, click **OK**.

The server will be removed from the Storage Platform.

Configuring a Slave AccountServer

You can configure the Slave AccountServer in the same manner as a normal AccountServer. For more information, see Configuring an AccountServer in Chapter 7, “Storage Platform Configuration”.

Renaming a Slave AccountServer

To rename a Slave AccountServer:

1. In the Storage Platform Configuration tree, click the Slave AccountServer name.
2. On the **Slave AccountServer** menu, click **Rename Server**. Alternatively, right-click the Slave AccountServer name and then click **Rename Server** on the shortcut menu.
3. In the **Rename Slave AccountServer** dialog box that appears, type a new display name in the **Name of entry** box.
4. Click **OK**.

Restarting the Slave AccountServer service

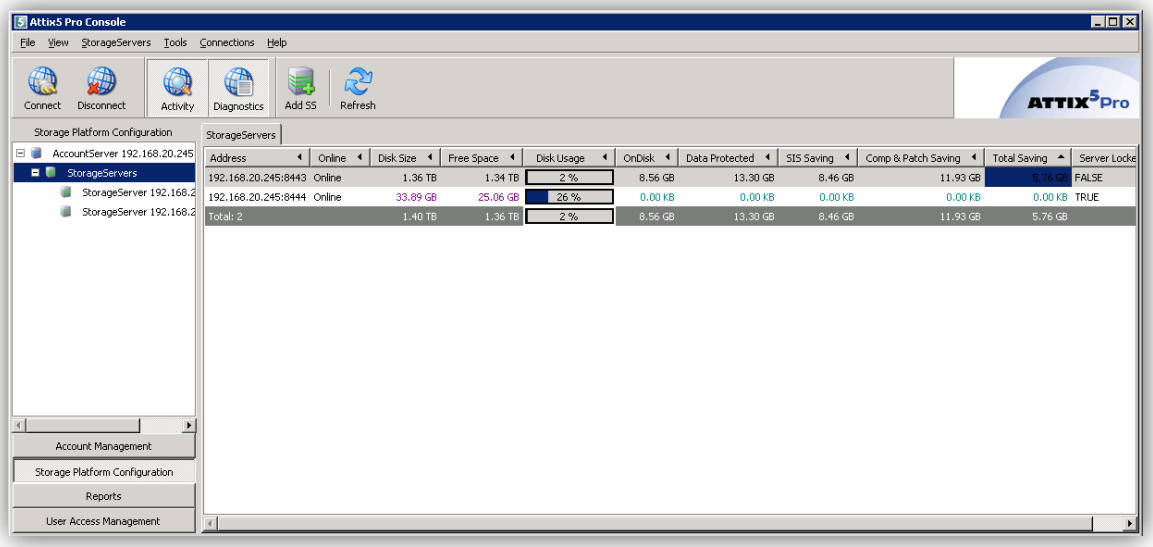
To restart the Slave AccountServer service:

1. In the Storage Platform Configuration tree, right-click the Slave AccountServer name, point to **Advanced**, and then click **Restart Service**.
2. In the confirmation dialog box that appears, click **Yes**.

StorageServers

A StorageServer is a secure data storage system that manages the data between the Storage Platform and Backup Clients during backups and restores. It can also receive mirror data from other StorageServers.

You can access an overview of all StorageServers' details by selecting the StorageServers node in the Storage Platform Configuration tree.


Attix5 Pro Console
File View StorageServers Tools Connections Help
Connect
Disconnect
Activity
Diagnostics
Add SS
Refresh
Storage Platform Configuration
AccountServer 192.168.20.245
StorageServers
StorageServer 192.168.2
StorageServer 192.168.2
StorageServers
Address Online Disk Size Free Space Disk Usage OnDisk Data Protected SIS Saving Comp & Patch Saving Total Saving Server Locke
192.168.20.245:8443 Online 1.36 TB 1.34 TB 2 % 8.56 GB 13.30 GB 8.46 GB 11.93 GB 5.76 GB FALSE
192.168.20.245:8444 Online 33.89 GB 25.06 GB 26 % 0.00 KB 0.00 KB 0.00 KB 0.00 KB 0.00 KB TRUE
Total: 2 1.40 TB 1.36 TB 2 % 8.56 GB 13.30 GB 8.46 GB 11.93 GB 5.76 GB
Account Management
Storage Platform Configuration
Reports
User Access Management

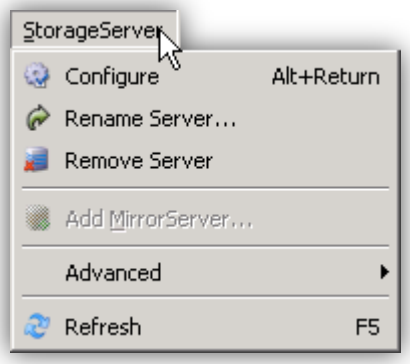
You can perform the following actions on StorageServers using the SP Console:

- **Add/remove/rename the server**
- **Add a MirrorServer**
- **Enable/disable/configure mirroring**
- **Start/cancel the mirroring process**
- **Restore data from a MirrorServer**
- **Enable/disable HSM**
- **Bind the StorageServer to an IP address**
- **Change the StorageServer IP address**
- **Lock/unlock the server**
- **Start a StorageServer clean-up**
- **Restart the StorageServer Service**
- **Access often-used reports**

All the above actions can be performed via the StorageServer main and shortcut menus.

To access the StorageServer main menu:

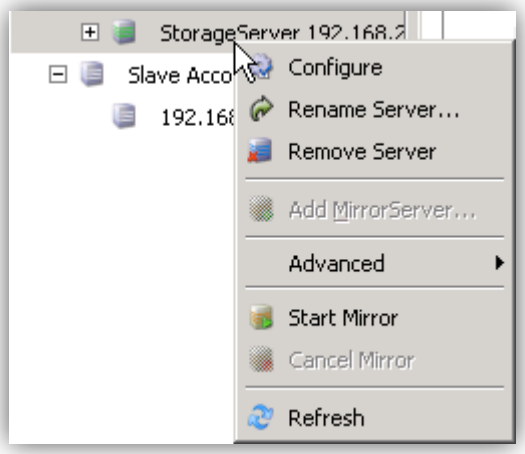
1. Open the Storage Platform Console.
2. Click the **Storage Platform Configuration** button in the view selector.
3. In the Storage Platform Configuration tree, expand the AccountServer node.
4. Navigate to and then click the StorageServer name.
5. Click the **StorageServer** menu that appears on the menu bar.



For more information on each of the options available, see *Special menus and toolbar buttons* in Chapter 4, “Graphical User Interface (GUI)”.

To access the StorageServer shortcut menu:

1. Open the Storage Platform Console.
2. Click the **Storage Platform Configuration** button in the view selector.
3. In the Storage Platform Configuration tree, expand the AccountServer node.
4. Navigate to and right-click on the StorageServer name.



For more information on each of the options available, see *Special menus and toolbar button* in Chapter 4, “Graphical User Interface (GUI)”.

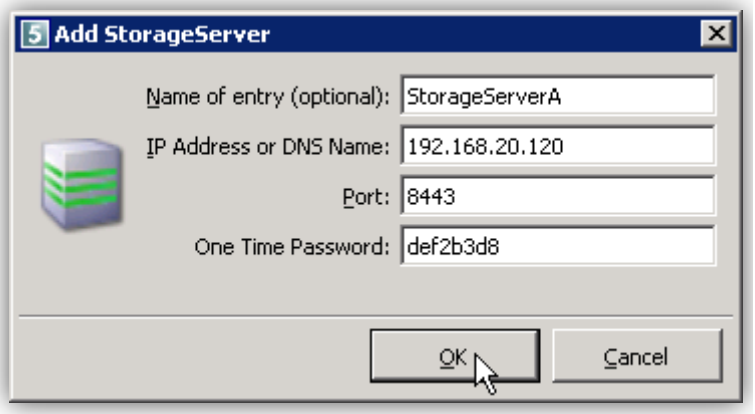
Adding, removing and renaming StorageServers

To add a StorageServer to your Storage Platform, you first install the Attix5 StorageServer software onto a Windows Server on your network. Once installed, follow the instructions below to add the new StorageServer to the SP Console management interface. For more information on the StorageServer installation process, please refer to the Storage Platform User Manual.

Note: Before beginning a StorageServer installation, please ensure that you have the correct hardware and software configuration, as specified in the Storage Platform User Manual.

To add a StorageServer to the AccountServer:

1. Click the AccountServer name or the **StorageServers** node in the Storage Platform Configuration tree.
2. Click the **Add SS** button on the toolbar. Alternatively, right-click the AccountServer name and then click **Add StorageServer**.
3. In the **Add StorageServer** dialog box that appears, type the required StorageServer information in the boxes provided.
4. Click **OK** to save your changes.



Note: You will have received the One Time Password during the server installation.

*Tip: Should you forget the OTP provided during installation, you can access it in the **Settings.xml** file located in **appdata%\Attix5 Pro\SS_Service**. It is the first 8 characters of the <ServerGuid> entry. I.e. <ServerGuid>**83470821**-caec-482c...*

The new StorageServer will be added to the list of StorageServers in the Storage Platform Configuration tree.

To remove a StorageServer from the AccountServer:

1. In the Storage Platform Configuration tree, click the name of the StorageServer.
2. On the **StorageServer** menu, click **Remove Server**. Alternatively, right-click the name of the StorageServer and then click **Remove Server** on the shortcut menu.
3. In the confirmation dialog box that appears, click **Yes**.

The StorageServer will be removed from the Storage Platform.

To rename a StorageServer:

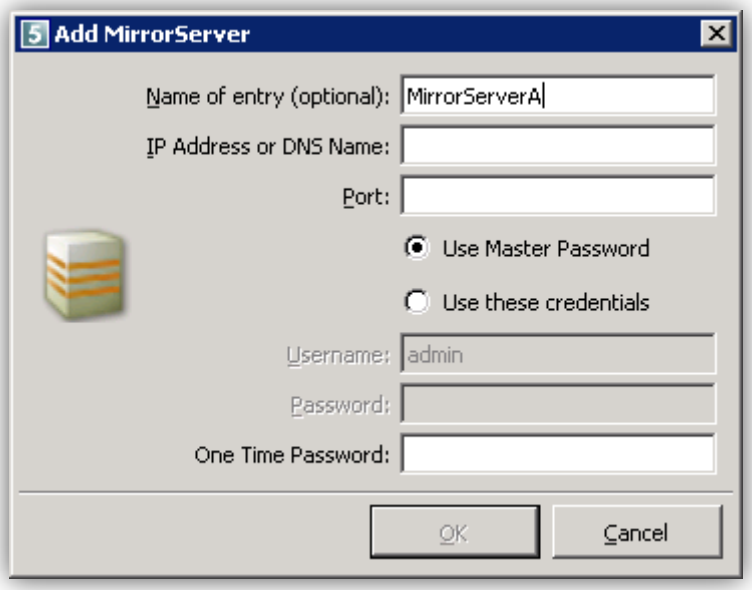
1. In the Storage Platform Configuration tree, click the StorageServer name.
2. On the **StorageServer** menu, click **Rename Server**. Alternatively, right-click the StorageServer name and then click **Rename Server** on the shortcut menu.
3. In the **Rename StorageServer** dialog box that appears, type a new display name in the **Name of entry** box.
4. Click **OK**.

Managing mirroring

In an Attix5 Pro backup environment, you can back up StorageServer data to another server called a "MirrorServer". For more information, see "MirrorServers" later in this chapter. Once you have a MirrorServer installed, you can use the SP Console to add it to your StorageServer and configure a mirror schedule.

To add a MirrorServer to a StorageServer:

1. Install a StorageServer that will be used as a MirrorServer using the Storage Platform installer. (For more information, please refer to the Storage Platform User Manual.)
2. In the Storage Platform Configuration tree, click the StorageServer that will be mirrored.
3. On the **StorageServer** menu, click **Add MirrorServer**. Alternatively, right-click the StorageServer name, and then click **Add MirrorServer**.
4. In the **Add MirrorServer** dialog box that appears, type a display name in the **Name of entry** box if you wish to use one.



5. Type the IP address or DNS name in the box provided.
6. In the **Port** box, type the port number to be used.
7. Select the login credentials you wish to use: **Use Master Password** or **Use these credentials**.
8. If necessary, type the login details in the boxes provided.
9. In the **One Time Password** box, type the password provided to you during the StorageServer installation.

> *Tip: Should you forget the OTP provided during installation, you can access it in the **Settings.xml** file located in **%appdata%\Attix5 Pro\SS_Service**.*
> *It is the first 8 characters of the <ServerGuid> entry.*
> *I.e. <ServerGuid>**83470821**-caec-482c...*

10. Click **OK**.
11. In the **Configure StorageServer** dialog box that appears, configure the **MirrorTo** tab as described in step 2 below.

> *Tip: Refresh the SP Console to view the **MirrorServer** node in the Storage Platform Configuration tree. You can now configure the mirroring setup and schedule.*

To enable mirroring from the StorageServer to the MirrorServer:

1. Click the StorageServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the StorageServer name and then click **Configure**.
2. On the **Mirror To** tab, select the **Mirror this StorageServer** check box.
3. Configure the Target, Mirror Schedule and Create Catch-up areas as desired. For more information, see "Configure StorageServer dialog box" later in this chapter.
4. Click **OK**.
5. In the Storage Platform Configuration tree, click the MirrorServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the StorageServer name and then click **Configure** or double-click the MirrorServer name.
6. Click the **Mirror From** tab.
7. Depending on the login credentials chosen when adding the MirrorServer (as described in step 7 of "To add a MirrorServer to a StorageServer" above), perform one of the following actions:
    a. If **Use Master Password** was selected, ensure that the **Master Password** check box is selected.
    b. If other credentials were supplied, select the **Mirror Accounts** check box, click the **Add** button, and then enter the same credentials specified during the "Add MirrorServer" process (as described in step 7 of "To add a MirrorServer to a StorageServer). Click **OK**.
8. Click **OK**.

To disable mirroring from the StorageServer to the MirrorServer:

1. Click the StorageServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the StorageServer name and then click **Configure**.
2. On the **Mirror To** tab, clear the **Mirror this StorageServer** check box.
3. Click **OK**.

To configure mirroring:

1. Click the StorageServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the StorageServer name and then click **Configure**.
2. On the **Mirror To** tab, ensure that the **Mirror this StorageServer** check box is selected.
3. Configure the settings on the **Mirror To**, **Mirror Throttle** and **Mirror From** tabs as desired. For more information, see "Configure StorageServer dialog box" later in this chapter.
4. Once you've configured all the settings, click **OK**.

To start the mirroring process:

1. In the Storage Platform Configuration tree, click the StorageServer name.
2. Click the **Start Mirror** button on the toolbar.

Tip: Logs related to the mirroring process will display in the Diagnostics area.

To cancel the mirroring process:

1. Click the StorageServer name.
2. Click the **Cancel Mirror** button on the toolbar.

To restore data from a MirrorServer:

Warning: *Restoring the data from a MirrorServer deletes the existing data on your StorageServer. Use with caution and ensure that your MirrorServer is also configured before starting this process.*

1. Open the Storage Platform Console and then click the **Storage Platform Configuration** button in the view selector.
2. In the Storage Platform Configuration tree, select the name of the StorageServer you wish to use to restore the data.
3. Click the **Configure** button on the toolbar.
4. On the **MirrorTo** tab, ensure that the correct MirrorServer settings are configured and then click the **Restore Mirror** button.

   The StorageServer will restore the mirrored data from the MirrorServer. This **deletes and replaces the existing StorageServer** and includes the Backup Account data and the AccountServer database.

   Warning: *Mirroring is disabled when you click this button to ensure that no scheduled mirrors will be initiated during the restore process.*

5. After the restore has completed, select the AccountServer name in the tree, and then click the **Restore DB** button on the toolbar. This will restore the AccountServer database from the StorageServer to the AccountServer.
6. Enable mirroring again in the StorageServer **MirrorTo** section.

Enabling/disabling HSM

Hierarchical Storage Management (HSM) enables you to move roll-ups to a removable device before they are deleted. (For more information on roll-ups, see *Roll-ups tab* in Chapter 6, "Account Management".) These archives (roll-ups) can then be restored to the live Storage Platform at any stage if data has to be recovered from a backup set that is no longer available online.

In order to use the HSM feature, you first need to enable HSM on the StorageServer and then enable and configure how you would like it to function at Group level. Below are instructions on enabling and disabling HSM on the StorageServer. See *Roll-ups tab* in Chapter 6, "Account Management" for instructions on enabling and configuring HSM at the Group level.

To enable HSM on the StorageServer:

1. Click the StorageServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the StorageServer name and then click **Configure**.
2. Click the **HSM** tab.
3. Select the **Enable HSM on this StorageServer** check box.
4. Select the format in which the HSM files should be saved.
5. Ensure that the HSM folder export and import directories are correct.
6. Click **OK**.

To disable HSM on the StorageServer:

1. Click the StorageServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the StorageServer name and then click **Configure**.
2. Click the **HSM** tab.
3. Clear the **Enable HSM on this StorageServer** check box.
4. Click **OK**.

Managing the StorageServer IP address

The Storage Platform Console allows you to specify which IP address a StorageServer should bind to when multiple IP addresses are available. It also allows you to change the StorageServer IP address altogether, should the need arise. See below for instructions on performing each task.

Bindings

On a multi-homed system (a server with multiple IP addresses), you can select which IP address the StorageServer should bind to.

To bind a StorageServer to a specific IP address:

1. Click the StorageServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the StorageServer name and then click **Configure**.
2. Click the **Bindings** tab.
3. Select the IP address you wish to bind the StorageServer to.
4. Click **OK**.

For more information on configuring bindings, see "Bindings" later in this chapter.

Changing the StorageServer IP address

Warning: *This is an advanced function and should be used with caution. Changing the StorageServer IP address on the AccountServer will result in ALL Backup Clients using the new address.*

To change the StorageServer IP address:

1. In the Storage Platform Configuration tree, click the name of the StorageServer.
2. On the **StorageServer** menu, point to **Advanced**, and then click **Change StorageServer address**. Alternatively, right-click the name of the StorageServer, and then point to **Advanced** and click **Change StorageServer address** on the shortcut menu.
3. In the **Warning** dialog box that appears, click **OK**.
4. In the **Change Server IP and Port on AccountServer** dialog box, modify the IP address and port number as required.
5. Click **OK**.

Locking/unlocking the StorageServer

The Storage Platform Console allows you to lock and unlock StorageServers. Locking a server prevents any new Backup Accounts from being added to it. Unlocking a server allows the addition of new Backup Accounts.

To lock the StorageServer:

1. In the Storage Platform Configuration tree, click the StorageServer name.
2. On the **StorageServer** menu, point to **Advanced**, and then click **Lock StorageServer**. Alternatively, right-click the StorageServer name and then point to **Advanced** and click **Lock StorageServer** on the shortcut menu.
3. In the **Warning** dialog box that appears, click **Yes**.

The StorageServer will be locked and Backup Users will not be able to add Backup Accounts to it. You can, however, unlock the server at any time, thereby allowing new Accounts to be added to it.

To unlock the StorageServer:

1. In the Storage Platform Configuration tree, click the StorageServer name.
2. On the **StorageServer** menu, point to **Advanced**, and then click **Unlock StorageServer**. Alternatively, right-click the StorageServer name and then point to **Advanced** and click **Unlock StorageServer** on the shortcut menu.
3. In the **Info** dialog box that appears, click **Yes**.

Users will now be able to add new Backup Accounts to this StorageServer.

Starting a StorageServer clean-up

To start a clean-up:

1. In the Storage Platform Configuration tree, click the StorageServer name.
2. On the **StorageServer** menu, point to **Advanced**, and then click **Start Clean-up**.

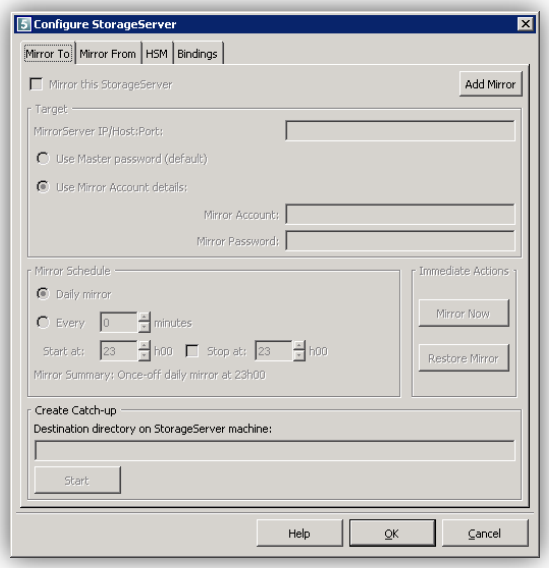
Restarting the StorageServer service

To restart the StorageServer service:

1. In the Storage Platform Configuration tree, right-click the StorageServer name, point to **Advanced**, and then click **Restart Service**.
2. In the confirmation dialog box that appears, click **Yes**.

Configure StorageServer dialog box

Mirror To tab



To enable a StorageServer to mirror data to another server, you need to add a MirrorServer to it. You can do this using the Add Mirror button on this tab or using the StorageServer main menu or shortcut menu, as described in "Managing mirroring" later in this chapter.

Once a MirrorServer has been added, the following tab areas and configuration options will be available:

Target

In this area, you can specify the MirrorServer IP address and port number (e.g. 192.168.20.147:8443) and supply the Mirror Account details in the boxes provided.

Mirror Schedule

Configure the Mirror Schedule by selecting either Daily Mirror or Every x minutes, and then specify the time at which the mirror should start. You also have the option to specify a mirror window by adding a mirror end time. When the end time is reached, the Mirror process is cancelled, and will commence again at the configured start time. The Mirror Summary displays the exact mirror schedule, e.g. Once-off daily mirror from 03h00 to 08h00, Every 45 minutes between 05h00 and 10h00, or Every 180 minutes.

Create Catch-up

Mirror Catch-up enables you to manually get your MirrorServer up to date if it is a few days behind and there is too much data to be transferred over limited bandwidth.

To use the Mirror Catch-up tool:

1. Specify a Destination directory. This destination directory could, for example, be a temporary USB hard drive connected to the Storage Platform.

   Note: Mirror Catch-up is only available if Mirroring is enabled.

2. To initiate the process, click **Start**. The Storage Platform will copy all relevant Account data to the specified directory.

> *Note: Mirroring is disabled during this process.*

The SP Console will notify you when all the files have been copied to the specified location.

3. Import the data on the MirrorServer:
    a. After you have attached the USB hard drive to the MirrorServer, open the StorageServer **Mirror From** tab.

    > *Note: This must be the actual MirrorServer.*

    b. Specify the **Destination directory on StorageServer machine**.
    c. Click **Start**.

The Storage Platform will transfer the data to the correct locations and notify you when the transfer is complete.

> *Note: Remember to enable Mirroring again on the main StorageServer (on the **MirrorTo** tab) once the Mirror Catch-up is complete.*

Immediate Actions

Use the **Mirror Now** button to initiate the mirroring process. Progress is displayed in the Activity area. Use the **Restore Mirror** button to restore files from the MirrorServer.

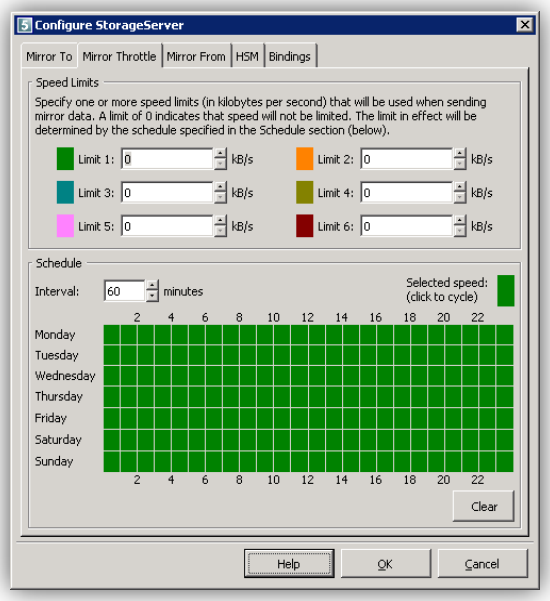
> ***Warning:** Please read the instructions carefully before initiating a Mirror restore.*

Mirror Throttle tab

The **Mirror Throttle** tab enables you to specify bandwidth usage speed limits by creating a mirror throttle schedule. Mirrored data will then only be transferred at the specified speed limits during each interval.

> *Tip: This is very advantageous as you can limit the mirroring bandwidth during peak hours rather than having to cancel the process.*

Changes are immediate, as you will see in the Activity area, where the transfer speed is displayed.



Speed Limits

In the **Speed Limits** area, you can specify up to six limits to be applied at times specified in the Schedule area.

Schedule

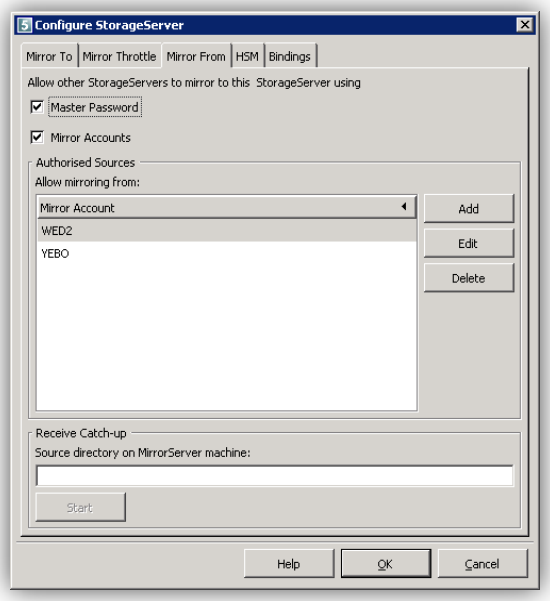
In the Schedule area, you can schedule the times at which the limits configured in the Speed Limits area will be enforced.

To schedule the mirroring limits:

1. Specify an interval duration between 15 minutes and 1440 minutes (24 hours).
2. Click a speed limit colour in the **Speed Limits** area (or click the **Selected Speed** colour in the **Schedule** area to cycle through the available limits).
3. Configure the Schedule by clicking in the desired Schedule interval boxes.

*Tip: The **Clear** button will clear the Schedule.*

Mirror From tab



You may configure the StorageServer to receive mirror data from other StorageServers.

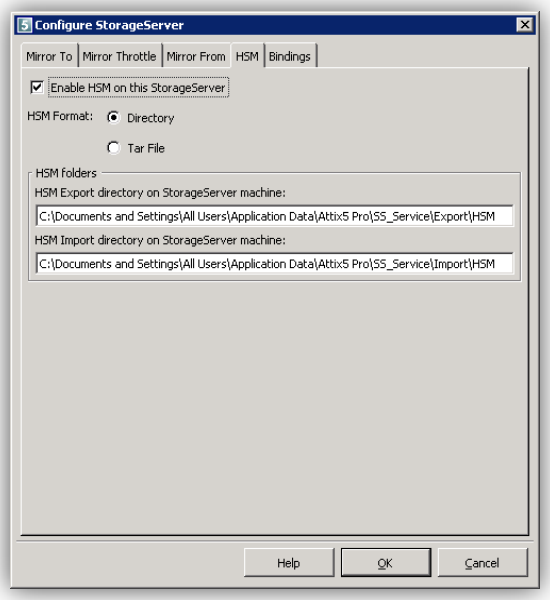
To enable other StorageServers to mirror to this one:

1. Select the login credentials to be allowed (Master Password and/or Mirror Account[s]).
2. If you select the **Mirror Accounts** check box, you can use the **Add**, **Edit** and **Delete** buttons to create and manage a list of Accounts in the Mirror Account list. All accounts in this list will be allowed to mirror to this StorageServer.
3. Click **OK**.

*Tip: Every night at midnight, a log file is created which logs the total usage for each mirror client. This file is located in the **Logs** directory (in the directory in which the Storage Platform is installed) and is called **MIRRORTOTALS<date>.LOG**.*

HSM tab

HSM (Hierarchical Storage Management) in Attix5 Pro enables you to move roll-ups before they are deleted. (For more information on roll-ups, see *Configuring Group Settings* in Chapter 6, "Account Management".)



You have two HSM format options: **Directory** and **Tar File**. Choose the **Directory** HSM format if you wish to store the roll-up data in its original directory structure.

Alternatively, select **Tar File** to compress each roll-up into a single Tar file during the HSM process and thereby speed up the transfer to the destination directory.

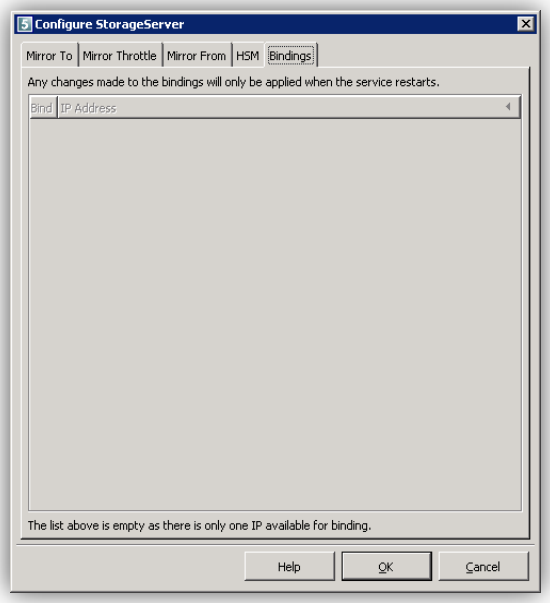
Tip: *Data saved in HSM format can be archived to an external drive or a share on a network and then moved back to the live Storage Platform at any stage if data has to be recovered from a backup set that is no longer available.*

Once you've selected the HSM format, note the Export and Import folder locations on the StorageServer machine. You will need to navigate to these locations to make HSM data available for restore on Clients. (For more information, see "Importing HSM data" later in Chapter 6, "Account Management".) If you wish to change the default locations, edit the fields, and then click **OK**.

Warning: *Please ensure that the directories specified for HSM have enough space to accommodate your archive data.*

Bindings tab

On a multi-homed system (a server with multiple IP addresses), you can select which IP address the StorageServer should bind to.



> ***Note:*** *This setting will only be enabled if multiple IP addresses are available.*

Access often-used reports

To access often-used StorageServer reports:

1. In the Storage Platform Configuration tree, right-click the StorageServer name.
2. Point to **Reports**, and then select the report that you want to access.

MirrorServers

In some backup environments, you may wish to increase redundancy by sending a copy of StorageServer data to another server. The duplicate server could be used as a replacement if your primary StorageServer goes down for any reason.

Attix5 Pro allows you to set up and maintain a copy of StorageServer data on another server called a "MirrorServer". An Attix5 Pro MirrorServer can be set up onsite or at a separate location. You can then configure the StorageServer to send a copy of all backups to it either once a day or at specified intervals. This is especially useful for backup environments that would benefit from having a Disaster Recovery site.

Note: Please refer to the Storage Platform User Manual for detailed instructions on the physical setup of MirrorServers. Once your MirrorServer is installed and online, you can use the SP Console to connect your StorageServer (or another MirrorServer) to it and then configure the mirroring process.

Tip: With Attix5 Pro, you also have the option to mirror data between StorageServers (a StorageServer can function as both a StorageServer and MirrorServer [receiving mirrored data from another StorageServer]).

Using the SP Console, you can manage the following MirrorServer connections and processes:

- **Add MirrorServers to StorageServers (See "StorageServers" earlier in this chapter)**
- **Add MirrorServers to other MirrorServers**
- **Rename/remove servers**
- **Enable/disable/configure mirroring**
- **Start/cancel the mirroring process**
- **Restore data from a MirrorServer (See "StorageServers" earlier in this chapter)**
- **Enable/disable MirrorServer HSM**
- **Bind the MirrorServer to an IP address**

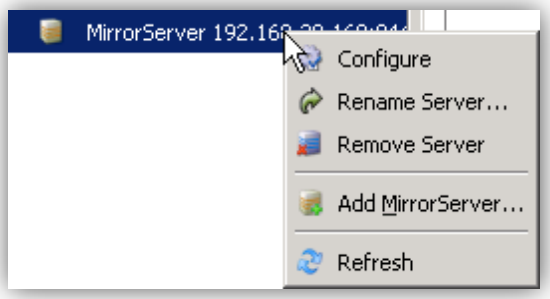
All the above actions can be performed via the MirrorServer main and shortcut menus.

To access the MirrorServer main menu:

1. Open the Storage Platform Console.
2. Click the **Storage Platform Configuration** button in the view selector.
3. In the Storage Platform Configuration tree, expand the AccountServer node.
4. Navigate to and then click the MirrorServer name.
5. Click the **MirrorServer** menu that appears on the menu bar.

To access the MirrorServer shortcut menu:

1. Open the Storage Platform Console.
2. Click the **Storage Platform Configuration** button in the view selector.
3. In the Storage Platform Configuration tree, expand the **AccountServer** node.
4. Navigate to and right-click on the MirrorServer name.



For more information on each of the options available, see *Special menus and toolbar buttons* in Chapter 5, "Graphical User Interface (GUI)".

Adding, removing and renaming MirrorServers

To add a MirrorServer to a StorageServer:

See "StorageServers" earlier in this chapter.

To add a MirrorServer to another MirrorServer

1. Install a MirrorServer using the Storage Platform installer. For more information, please refer to the Storage Platform User Manual.
2. In the Storage Platform Configuration tree, right-click the MirrorServer name and then click **Add MirrorServer**.
3. In the **Add MirrorServer** dialog box that appears, type a display name in the **Name of entry** box if you wish to use one.
4. Type the IP address or DNS name in the box provided.
5. In the **MirrorServer Port** box, type the port number to be used.
6. Type the Administrator password in the **Password** box.
7. Select the **Save Password** check box if you wish the SP Console to pre-populate the **Password** box for future MirrorServer additions.
8. Click **Save & Connect**.

Refresh the SP Console to view the **MirrorServer** node in the Storage Platform Configuration tree. You can now configure the mirroring setup and schedule. For more information, see "Enabling, disabling and managing mirroring" later in this chapter.

To rename a MirrorServer:

1. In the Storage Platform Configuration tree, click the StorageServer name.
2. On the **StorageServer** menu, click **Rename Server**. Alternatively, right-click the StorageServer name and then click **Rename Server** on the shortcut menu.
3. In the **Rename MirrorServer** dialog box that appears, type a new display name in the **Name of entry** box.
4. Click **OK**.

To remove a MirrorServer:

1. In the Storage Platform Configuration tree, click the MirrorServer name.
2. On the **MirrorServer** menu, click **Remove Server**. Alternatively, right-click the MirrorServer name and then click **Remove Server** on the shortcut menu.
3. In the confirmation dialog box that appears, click **Yes**.
4. A second confirmation dialog box will appear, asking if you wish to remove all Accounts on the MirrorServer. Click **Yes** to remove all Accounts immediately. Click **No** to keep all Accounts.

Enabling, disabling and managing mirroring

To enable mirroring from the StorageServer to the MirrorServer:

See “StorageServers” earlier in this chapter.

To enable mirroring from one MirrorServer to another:

1. In the Storage Platform Configuration tree, click the parent MirrorServer name, and then click the **Configure** button on the toolbar. Alternatively, right-click the MirrorServer name, and then click **Configure**.
2. The **Configure StorageServer** dialog box appears and displays the **Mirror To** tab by default. Select the **Mirror this StorageServer** check box.
3. Configure the **Target**, **Mirror Schedule** and **Create Catch-up** areas as desired. For more information, see “Configure MirrorServer dialog box” later in this chapter.
4. Click **OK**.
5. In the Storage Platform Configuration tree, click the child MirrorServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the MirrorServer name and then click **Configure**.
6. Click the **Mirror From** tab.
7. Select the login credentials allowed to mirror to this server. If a particular Mirror Account is to be used, create a Mirror Account using the **Add** button. (For more information, see “Mirror From tab” later in this chapter.
8. Click **OK**.

To disable mirroring from the StorageServer to the MirrorServer:

See “StorageServers” earlier in this chapter.

To disable mirroring from one MirrorServer to another:

1. Click the parent MirrorServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the MirrorServer name and then click **Configure**.
2. On the **Mirror To** tab, clear the **Mirror this StorageServer** check box.
3. Click **OK**.

To configure mirroring:

1. In the Storage Platform Configuration tree, click the MirrorServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the MirrorServer name and then click **Configure**.
2. On the **Mirror To** tab, ensure that the **Mirror this StorageServer** check box is selected.
3. Configure the settings on the **Mirror To**, **Mirror Throttle** and **Mirror From** tabs as desired. For more information, see "Configure MirrorServer dialog box" later in this chapter.
4. Once you've configured all the settings, click **OK**.

To start the mirroring process:

1. In the Storage Platform Configuration tree, click the MirrorServer name.
2. Click the **Start Mirror** button on the toolbar.

Tip: Logs related to the mirroring process will display in the Diagnostics area.

Notes:

- *At least one Backup Client needs to back up to the StorageServer or retrieve it's Backup Account settings before you can perform a full mirror.*
- *When you perform the first mirror, all StorageServer data is mirrored to the MirrorServer, including any roll-ups it may contain. Thereafter, the StorageServer will mirror without roll-ups, as the MirrorServer will perform its own roll-ups, according to its roll-up schedule. For more information on MirrorServer roll-ups, see the advanced section of* Roll-ups tab *in Chapter 6, "Account Management".*

Warning: *The MirrorServer must have the same major and minor version as the StorageServer, or later. If this is not the case, the mirror process will fail with the appropriate message appearing in the StorageServer log.*

Example: *In V6.2.3, 6 is the major version and 2 is the minor version. Therefore, if the StorageServer is V6.2.3, it can be mirrored to a V6.2.2 MirrorServer but not to a V6.1.1 MirrorServer.*

To cancel the mirroring process:

Click the MirrorServer name and then click the **Cancel Mirror** button on the toolbar.

To restore data from a MirrorServer:

See "StorageServers" earlier in this chapter.

Managing Mirror Accounts

When configuring a MirrorServer (or StorageServer) to accept mirrored data from StorageServers, you can allow those StorageServers to connect to it using the Storage Platform's Master Password or a Mirror Account.

Master Password

The Master Password would have been defined during the Storage Platform installation process. It is the password used to access the AccountServer, StorageServer(s) and MirrorServer(s).

Tip: For instructions on how to change the Master Password, see "Master Password" under "Advanced Options" in the AccountServer *section of Chapter 7, "Storage Platform Configuration".*

Warning: *If mirroring more than one StorageServer, a maximum of one StorageServer should connect to the MirrorServer using the Master Password. The recommended setup would be to mirror each StorageServer using a different Mirror Account.*

Mirror Account

You may wish to prevent the StorageServer from mirroring with the Master Password (e.g. if more than one StorageServer is connecting to the same MirrorServer.) In such cases, you can create a Mirror Account with a username and password different to that of the Admin role.

Note: When mirroring via a Mirror Account, the MirrorServer certificate is not updated automatically and needs to be manually updated. To manually update the MirrorServer certificate, copy the ".p12" file from the StorageServer's ***SS_Service*** *folder to the MirrorServer's* ***.p12*** *folder.*
If the MirrorServer is managed by a separate party, who could be providing mirroring for several customers, the certificates should be managed by the separate party.

To create a Mirror Account:

1. Select the MirrorServer in the Storage Platform Configuration tree.
2. Click the **Configure** button on the main toolbar. Alternatively, click the **MirrorServer** menu, and then select **Configure** or right-click the server name and then select **Configure** on the shortcut menu that displays.
3. Click the **MirrorFrom** tab.
4. In the Authorised Sources area, click the **Add** button.
5. In the **Mirror Account** dialog box that appears, type an Account name and password in the boxes provided, and then click **OK**.
6. Click **OK** again to close the **Configure MirrorServer** dialog box.

The Mirror Account now exists on the MirrorServer but you need to configure the StorageServer that will be mirroring to it to use the new Account.

To configure a StorageServer to use a Mirror Account:

1. Select the server you wish to mirror in the Storage Platform Configuration tree.
2. Click the **Configure** button on the main toolbar. Alternatively, click the **StorageServer/MirrorServer** menu, and then select **Configure** or right-click the server name and then select **Configure** on the shortcut menu that displays.
3. On the **MirrorTo** tab, select **Use Mirror Account details**.
4. In the **Mirror Account** and **Mirror Password** boxes, type the same Mirror Account details you specified when creating the Account (see above).
5. Click **OK**.

The StorageServer and MirrorServer have now been configured to use a Mirror Account to perform mirrors. You can now start a Mirror.

To start mirroring data between a StorageServer and MirrorServer:

1. Ensure that the StorageServer is selected in the Storage Platform Configuration tree.
2. Click the **Start Mirror** button on the main toolbar. Alternatively, right-click the StorageServer name, and then click **Start Mirror** on the shortcut menu that appears.

Enabling/disabling MirrorServer HSM

Hierarchical Storage Management (HSM) enables you to archive ba before they are deleted. (For more information on roll-ups, see *Roll-ups tab* in Chapter 6, "Account Management".) These archives (roll-ups) can then be restored to the live Storage Platform at any stage if data has to be recovered from a backup set that is no longer available online.

In order to use the HSM feature, you first need to enable HSM on the MirrorServer and then enable and configure how you would like it to function at Group level. Below are instructions on enabling and disabling HSM on the MirrorServer. See the advanced section of *Roll-ups tab* in Chapter 6, "Account Management" for instructions on enabling and configuring HSM at the Group level.

To enable MirrorServer HSM:

1. In the Storage Platform Configuration tree, click the MirrorServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the MirrorServer name and then click **Configure**.
2. Click the **HSM** tab.
3. Select the **Enable HSM on this StorageServer** check box.
4. Select the format in which the HSM files should be saved.
5. Ensure that the HSM folder export and import directories are correct.
6. Click **OK**.

For more information on Hierarchical Storage Management (HSM), see "HSM tab" later in this Chapter.

To disable MirrorServer HSM:

1. In the Storage Platform Configuration tree, click the MirrorServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the MirrorServer name and then click **Configure**.
2. Click the **HSM** tab.
3. Clear the **Enable HSM on this StorageServer** check box.
4. Click **OK**.

For more information on Hierarchical Storage Management (HSM), see "HSM tab" later in this chapter.

Managing the MirrorServer IP address

The Storage Platform Console allows you to specify which IP address a MirrorServer should bind to when multiple IP addresses are available. It also allows you to change the MirrorServer IP address altogether, should the need arise. See below for instructions on performing each task.

Bindings

On a multi-homed system (a server with multiple IP addresses), you can select which IP address the MirrorServer should bind to.

To bind a MirrorServer to a specific IP address:

1. Click the MirrorServer name and then click the **Configure** button on the toolbar. Alternatively, right-click the MirrorServer name and then click **Configure**.
2. Click the **Bindings** tab.
3. Select the IP address you wish to bind the MirrorServer to.
4. Click **OK**.

For more information, see "Bindings tab" later in this chapter.

Changing the StorageServer IP address

Warning: *This is an advanced function and should be used with caution. Changing the StorageServer IP address on the AccountServer will result in ALL Backup Clients using the new address.*

To change the MirrorServer IP address:

1. In the Storage Platform Configuration tree, click the name of the MirrorServer.
2. On the **MirrorServer** menu, point to **Advanced**, and then click **Change MirrorServer address**. Alternatively, right-click the name of the MirrorServer, and then point to **Advanced** and click **Change MirrorServer address** on the shortcut menu.
3. In the **Warning** dialog box that appears, click **OK**.
4. In the **Change Server IP and Port on AccountServer** dialog box, modify the IP address and port number as required.
5. Click **OK**.

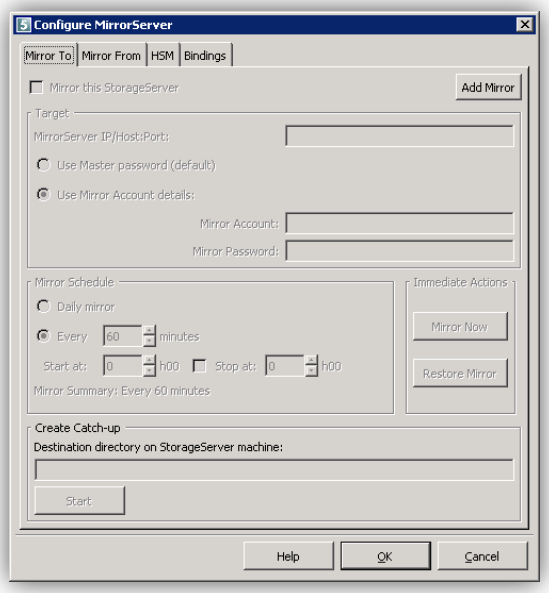
Restarting the MirrorServer service

To restart the MirrorServer service:

1. In the Storage Platform Configuration tree, right-click the MirrorServer name, point to **Advanced**, and then click **Restart Service**.
2. In the confirmation dialog box that appears, click **Yes**.

Configure MirrorServer dialog box

Mirror To tab



You can use the **Add Mirror** button to add another MirrorServer to this one. See "Adding, removing and renaming MirrorServers" earlier in this chapter. Once added, the **Mirror this StorageServer** check box will be selected by automatically. Below are descriptions of the options available when mirroring is enabled.

Target

In this area, you can specify the MirrorServer IP address and port number e.g. 192.168.20.147:8443, and supply the Mirror Account details in the boxes provided.

Mirror Schedule

Configure the Mirror Schedule by choosing either **Daily Mirror** or **Every x minutes**, and then specifying the time at which the mirror should start. You also have the option to specify a mirror window by adding a mirror end time. When the end time is reached, the Mirror process is cancelled, and will commence again at the configured start time. The **Mirror Summary** displays the exact mirror schedule, e.g. Once-off daily mirror from 03h00 to 08h00, Every 45 minutes between 05h00 and 10h00, or Every 180 minutes.

Create Catch-up

Mirror Catch-up enables you to manually get your MirrorServer up to date, if it is a couple of days behind and there are too much data to be transferred over limited bandwidth.

To use the Mirror Catch-up tool, specify a **Destination directory**. This destination directory could, for example, be a temporary USB hard drive connected to the Storage Platform. Note that Mirror Catch-up is only available if Mirroring is enabled. To initiate the process, click **Start**. The Storage Platform will copy all relevant account data to the specified directory.

Note: Mirroring is disabled during this process.

The Storage Platform Console will notify you when all the files have been copied to the specified location.

Next, import the data on the MirrorServer. After you have attached the USB hard drive to the MirrorServer, open the StorageServer **Mirror From** tab. Note this must be the actual MirrorServer. Specify the **Source directory on StorageServer machine** and click **Start**.

The Storage Platform will transfer the data to the correct locations and notify you when the transfer is complete.

*Note: Remember to enable mirroring again on the main StorageServer, in the **MirrorTo** tab, once the Mirror Catch-up is complete.*

Immediate Actions

Use the **Mirror Now** button to initiate the mirroring process. Progress is displayed in the Activity area. Use the **Restore Mirror** button to restore files from the MirrorServer.

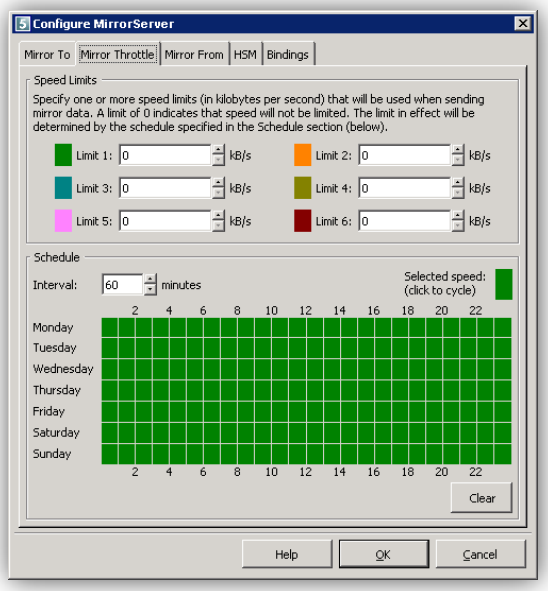
***Warning:** Please read the instructions carefully before initiating a Mirror restore.*

Mirror throttle tab

The **Mirror Throttle** tab enables you to specify bandwidth usage speed limits by creating a mirror throttle schedule. Mirrored data will then only be transferred at the specified speed limits during each interval.

Note: This tab is only available if the MirrorServer is configured to mirror to another MirrorServer. See Adding, removing and renaming MirrorServers.

Tip: This is very advantageous as you can limit the mirroring bandwidth during peak hours rather than having to cancel the process.



Changes are immediate, as you will see in the Activity area, where the transfer speed is displayed.

Speed Limits

In the **Speed Limits** area, you can specify up to six limits to be applied at times specified in the Schedule area.

Schedule

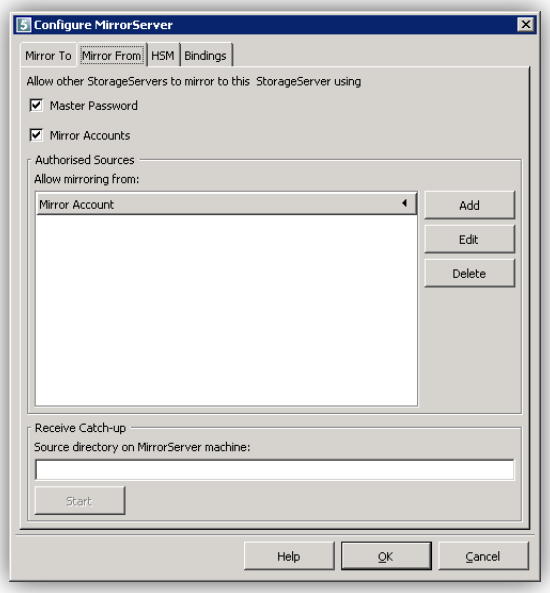
In the Schedule area, you can schedule the times at which the limits configured in the Speed Limits area will be enforced.

To schedule the mirroring limits:

1. Specify an interval duration between 15 minutes and 1440 minutes (24 hours).
2. Click a speed limit colour in the **Speed Limits** area (or click the **Selected Speed** colour in the **Schedule** area to cycle through the available limits).
3. Configure the Schedule by clicking in the desired Schedule interval boxes.

*Tip: The **Clear** button will clear the Schedule.*

Mirror From tab



You may configure the MirrorServer to receive mirror data from other StorageServers.

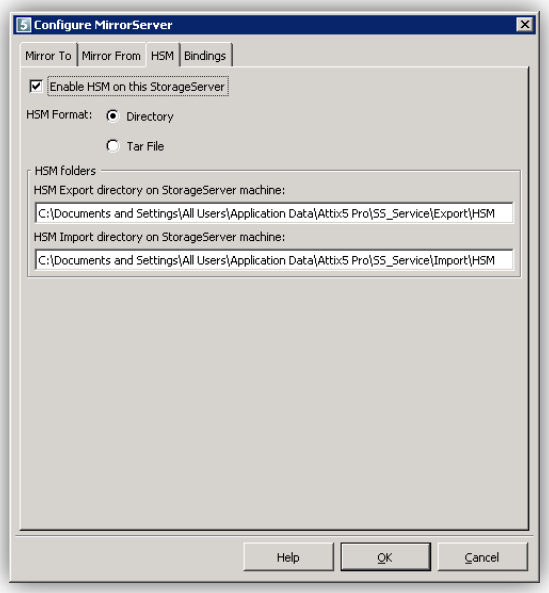
To enable other StorageServers to mirror to this one:

1. Select the login credentials to be allowed.
2. Click the **Add** button.
3. In the **Mirror Account** dialog box that appears, type the Mirror Account name and password in the boxes provided.
4. Click **OK**.

*Tip: Every night at midnight, a log file is created which logs the total usage for each mirror client. This file is located in the **Logs** directory (in the directory in which the Storage Platform is installed) and is called **MIRRORTOTALS<date>.LOG**.*

HSM tab

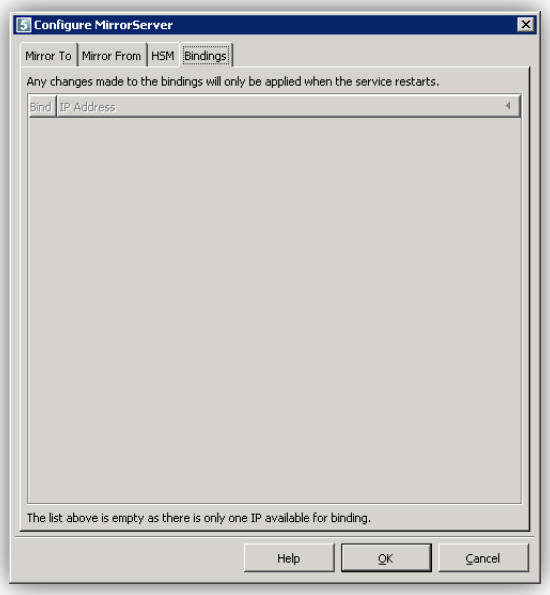
HSM (Hierarchical Storage Management) in Attix5 Pro enables you to move roll-ups before they are deleted. For more information on roll-ups, see *Configuring Group Settings* in Chapter 6, “Account Management”.



Tip: Roll-ups can be archived to a location separate to the Storage Platform and then moved back to the live Storage Platform at any stage if data has to be recovered from a backup set that is no longer available.

Bindings tab

On a multi-homed system (a server with multiple IP addresses), you can select which IP address the MirrorServer should bind to.



Note: This setting will only be enabled if multiple IP addresses are available.

Chapter 8: Reports

Reports view

In the Reports view, you can administer the following:

- **Enterprise Reports**
- **Standard Reports**

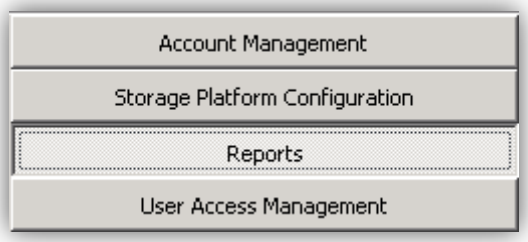
You can manually run reports at any point in time or schedule that they be emailed automatically.

Notes:

- *Standard Reports are installed by default and can be used by any Admin user.*
- *Enterprise Reports are provided to Enterprise Reports subscribers. For more information, please contact your software provider.*
- *If you do not see the Enterprise section in the left-hand pane, it is not installed and/or activated. Please contact your Service Provider for additional information.*
- *Report logging is displayed in the Storage Platform Diagnostics area.*

To access the Reports view:

1. Open the SP Console and connect to the Storage Platform. [See Chapter 5, "Graphical User Interface (GUI)".]
2. In the view selector on the left of the SP Console, click the **Reports** button.



Reports view icon legend		
Icon	**Location**	**Description**
	Reports tree	Enterprise Reports node
	Reports tree	Standard Reports node
	Reports tree – Enterprise node	Enterprise report
	Reports tree – Standard node	Enabled report
	Reports tree – Standard node	Disabled report

Enterprise Reports

The Enterprise ReportServer collects information from the AccountServer at predefined intervals and populates it into an ODBC-enabled database. This database can be queried using the Enterprise Reports.

Notes:

- *The Enterprise Reports feature will only be available in the SP Console once it has been licenced. To acquire a licence, please contact your software provider.*
- *This User Manual describes how to work with existing SP Console reports. For information on creating new reports and advanced report editing, please refer to the Attix5 Pro Enterprise Reports User Manual.*
- *Normal database management needs to occur to ensure correct report functionality.*

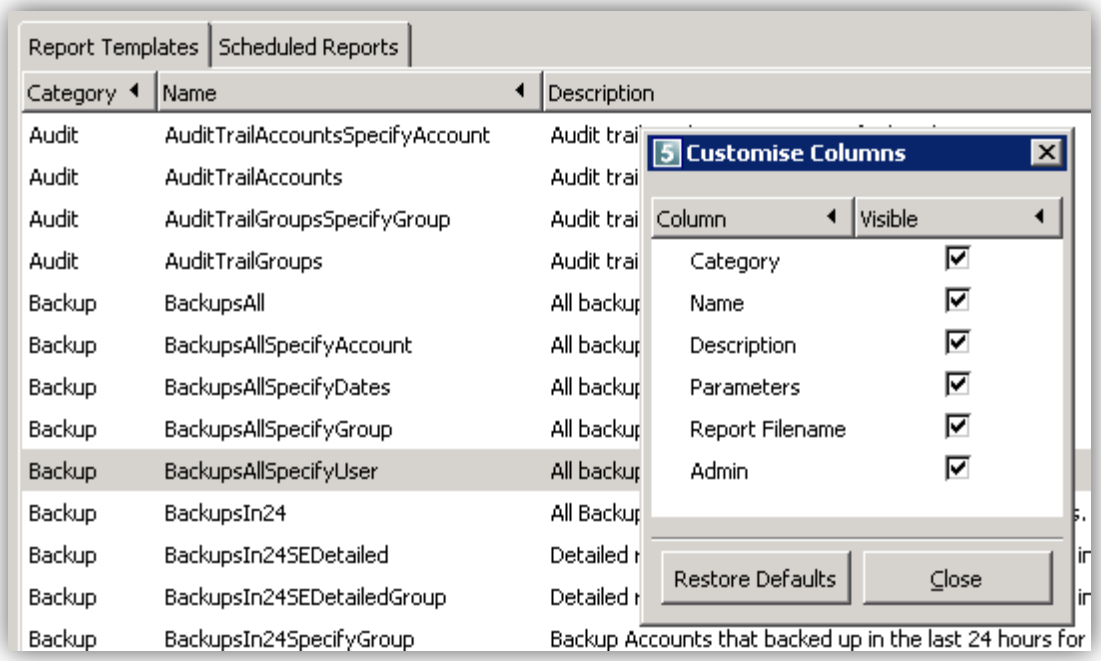
An extensive range of report templates are available in the SP Console and displayed on the **Report Templates** tab in the work area when the **Enterprise** node is selected. These templates are grouped into nodes in the Reports tree, according to their functionality:

- **Audit** – Various audit trail reports to track user access and Storage Platform changes at Group and Account level.
- **Backup** – Backup reports include all backups for a specified period/Group/Account, detailed SE reports and the ability to highlight backups that did not backup in the last 24 hours.
- **HSM** – Reports include the Account name, roll-up date and the size and amount of files.
- **Licence** – Information on Storage Platform, Backup Groups and Backup Accounts level.
- **Mirror** – Reports include Mirror due, all mirrors done for the previous month, all mirrors due for the current month, and mirroring information for the current month.
- **Other** – Includes a range of reports from the Backup Account and group summaries to capacity, roll-ups and success reports.
- **Restore** – Provides information about all restores for the current and previous month.

Tip: For information on creating new categories and reports, please refer to the Attix5 Pro Enterprise Reports User Manual.

Modifying the display settings

When either the **Enterprise** node or a sub-category is selected, the **Report Templates** tab displays a list of reports and their properties. You can select the property columns you wish to display/hide using the **Customize Columns** dialog box.



To show/hide property columns in the work area:

1. Click the **Customize Columns** button on the toolbar.
2. In the **Customize Columns** dialog box that appears, specify which columns you wish to display by selecting the check boxes next to the column names.
3. Clear the check boxes next to the names of any columns you wish to hide.
4. Click **Close**.

*Tip: Click the **Refresh** button on the main toolbar option to refresh the Reports view.*

ReportServer properties

In some circumstances, you may wish to change the SP Console's ReportServer URL reference.

Examples:

- *If your AccountServer (which includes your ReportServer) is behind a firewall and the IP address is translated from public to private (NAT), you would need to configure the SP Console to use the public IP address or host name.*
- *You may wish to view your reports over a secure connection. To do this, you would need to change the SP Console's ReportServer IP address reference to begin with "https://" instead of "http://". Please note that to do this; you need to install the Root Certificates in your browser to prevent it warning you about the SP certificate every time you try to view a report.*

To change the ReportServer URL reference:

1. Click the **Enterprise** node in the Reports tree and then click the **Configure** button on the toolbar. Alternatively, double-click the **Enterprise** node.
2. In the **ReportServer properties** dialog box that appears, modify the ReportServer URL field as required.
3. Click **OK** to save the changes or **Cancel** to exit the window.

In cases where you wish to view your reports over a secure connection, you should install Root Certificates in your browser to prevent it warning you about the SP certificate every time you try to view a report. The certificates are added to your computer's trusted root certificates.

To install Root Certificates:

1. In the **ReportServer properties** dialog box, click the **Install Root Certificates** button.
2. In the **Security Warning** dialog box that appears, click **Yes**.

Another modifiable ReportServer property is the report retention period. You can specify how long the ReportServer will keep reports before deleting them.

To modify the report retention period:

1. Click the **Enterprise** node in the Reports tree and then click the **Configure** button on the toolbar. Alternatively, double-click the **Enterprise** node.
2. In the **ReportServer properties** dialog box that appears, specify how long the ReportServer should store reports before deleting them (the retention period is enabled by default and set to 60 days.) Modify the settings as required.
3. Click **OK** to save the changes or **Cancel** to exit the window.

Running vs. scheduling reports

In the Reports view, you can run a report manually at any time or schedule reports to run at particular times.

To run a report manually:

1. In the Reports tree, click the report template type.
2. In the work area, right-click the report name and then click **Show report**. Alternatively, double-click the report name.

The report will open in your default Internet browser. You can also schedule reports to be emailed automatically. See below.

To create a scheduled report:

1. Click the **Schedule Report** button on the toolbar.
2. The wizard will prompt for the report category and report template to be used, if you did not select a particular report before clicking the **Schedule Report** toolbar button.
3. Provide a name and description for this report, and then click **Next**.
4. Specify the delivery schedule.
5. Specify the delivery options. Use the **Add** button to specify the email addresses to which the reports must be emailed. Multiple email addresses must be separated with a semicolon.

*Tip: Scheduled reports are displayed in the **Scheduled Reports** tab in the work area. The schedule of existing reports may be modified by clicking the **Configure** button on the main toolbar and can be removed by clicking the **Delete** button.*

Standard Reports

The following reports can be emailed to one or more specified email addresses automatically, notifying the recipient(s) of certain activities on the Storage Platform:

- **Overview Report** – This report enables you to receive an overview of all activities on the Storage Platform. Information includes Account Information, Backup Status, Mirror Status and Usage Status. Any Backup Account issues will also be highlighted in the report.
- **Licence Report** – This CSV file reports on all licences allocated in the Storage Platform, sorted by Group.
- **StorageServer Disk Space Report** – This report will give you an indication of how much hard disk space is used and available on the StorageServer.
- **Mirror Report** – This is a notification message that will be sent to you after mirroring was completed successfully. Information includes the mirror duration, the number of Backup Accounts mirrored and the amount of data that was transferred.
- **Storage Platform Expiry Report** – You can configure this to notify you a certain number of days before the Storage Platform expires.
- **Group Expiry Report** – This is a notification message that will be sent to you before any of the Storage Platform Groups expire.
- **StorageServer Down Report** – This is a notification message that will be sent to you when the AccountServer cannot communicate with the StorageServer.

Before you can enable these reports, you must supply valid SMTP settings that will be used when the reports are emailed.

To configure SMTP settings:

1. Click the **Standard** node in the left-hand pane and then click the **Configure** button on the toolbar. Alternatively, right-click the node and then click **Configure** on the shortcut menu that appears.
2. Type the host and port numbers in the boxes provided.
3. If the server requires authentication, select the **Server requires authentication** check box and then type the username and password details in the boxes provided.
4. Click the **Test SMTP** button to ensure that the details are correct.
5. If successful, click **OK**.

To enable a report:

1. Select the report name in the left-hand pane and then click the **Configure** button in the toolbar. You can also double-click the report entry.
2. Select the **Enable this report** check box.

3. Supply the required Report Configuration settings. You can enter multiple email addresses in the **To** box by separating them with commas.

   Notes:
   - The **BillingReport.csv** file is automatically attached to the Licence Report and includes the Storage Platform licence information, specified per group.
   - Additional files may be attached by supplying the filename and its full path.

4. In the Report SyncSchedule area, specify when you would like to email the reports by entering a date in the box provided or by selecting a particular email frequency.
5. Use the **Email this report now** button to send the report manually (you may wish to do this to verify that all settings are correct or if you only want to run the report once).

Tip: The Storage Platform Console Diagnostics area will display the necessary logging information.

Backing up/restoring a ReportServer database

By default, the ReportServer database is not backed up with the AccountServer database. In order to back up the ReportServer database to the SS and Slave AS together with the AccountServer database, create the following **AccountServer.Custom.config** file in the SP installation folder (add the parameter between the `<appSettings>` tags if the file already exists):

```
<?xml version="1.0" encoding="utf-8" ?>
<appSettings>
<add key="BackupReportDb" value="true" />
</appSettings>
```

Restart the AS for the change to take effect. Keep in mind that the ReportServer database is usually significantly larger than the AccountServer database so will take longer to back up and requires more space in the SS and Slave AS.

*Note: The **AccountServer.Custom.config** file needs to be applied to both the Master and Slave AccountServers. If the setting is not applied to the Slave, error messages may be encountered.*

The ReportServer database will be restored when you restore the AccountServer database.

Chapter 9: User Access Management

User Access Management enables the Backup Administrator to create Storage Platform Access Users, Groups and Roles. These Roles can then be assigned to Backup Groups in the Storage Platform Console's Account Management view. When Access Users connect to the SP Console, they will only see the views and options that they are allowed to manage. This enables you to provide the same application to many different types of users. E.g. Your support staff, helpdesk and financial department.

Notes:

- *User Access Management needs to be configured before you can configure access to Backup Groups in the Account Management pane.*
- *The default administrative account name in the Storage Platform Console is* ***admin*** *with the master password as specified during the Storage Platform installation.*

Warning: *As the admin user, you have full access to all options and settings. Please be careful when sharing the admin password. You are advised to create separate administrative Access Users for your support engineers, to ensure that changes to the Storage Platform can be tracked and audited.*

User Access Management view

In the User Access Management view, you can administer the following:

- **Access Users**
- **Access Groups**
- **Roles**

For more information on managing each of these components, see “Access Users”, “Access Groups”, and “Roles” below.

User Access Management view icon legend		
Icon	**Location**	**Description**
	User Access Management tree	Access Users/Access Groups/Roles node
	Access Users work area	User
	Access Groups work area	Group
	Roles work area	Role

Access Users

In the SP Console, you can manage Access Users as follows:

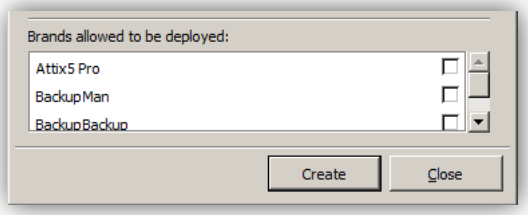
- **Add new Access Users**
- **Edit existing Access Users' rights**
- **Delete Access Users**

To add a new Access User:

1. Click **User Access Management** in the view selector.
2. Select **Access Users** in the User Access Management tree.
3. On the **User Access** menu, click **New Access User**. Alternatively, click the **New User** button on the toolbar.
4. In the **New Access User** dialog box that appears, specify the required Access User credentials.
5. Select the **Admin user** check box if you are creating an admin user.

   Note: Admin users have full access to all Storage Platform Console views and all brands on the Storage Platform.

6. Select which brands the user should be able to deploy. The brands available depend on the Backup Client update packs installed on the Storage Platform. If only one update pack is installed, you will not be able to assign multiple brands to that user. He will only be able to deploy the brand which is included in that update pack. For more information on deployments, see *Deployment Wizard* in Chapter 6, "Account Management".



   Notes:
   - *If the SP Console is open while Backup Client update packs are installed on your SP, the brands that were installed will not be immediately available for selection. To make them available, navigate to the **Storage Platform Configuration** view, right-click the **AccountServer** node, point to **Advanced** and click **Update Licence Info**. Then disconnect and reconnect to your SP.*
   - *Access to the LicenceServer is required to specify which brands a user should be able to deploy.*

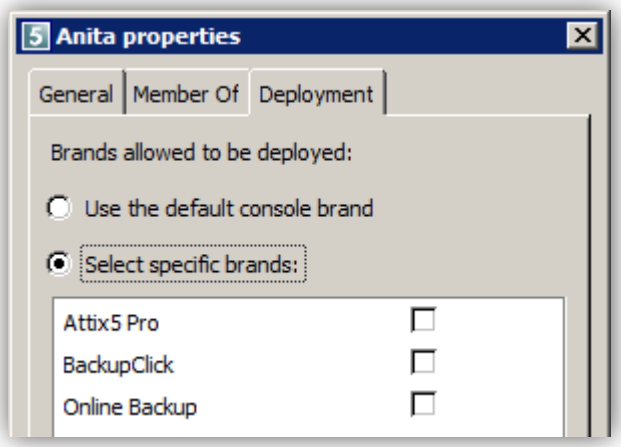
7. Click **Create** to add the user.

To modify the properties of an existing user:

1. Select **Access Users** in the User Access Management tree.
2. Select a user and click the **Configure** button on the toolbar. Alternatively, right-click a user and click **Configure**.
3. In the **User properties** dialog box that appears, modify the information as required, and then click **OK**.

Notes:

- *The **Member Of** tab enables you to add the user to an Access Group. Groups may also be added or removed from this tab.*
- *The **Deployment** tab allows you to specify which brands the user can deploy. This requires access to the LicenceServer.*



To delete a user:

1. Select **Access Users** in the User Access Management tree.
2. Select the user name in the right-hand pane.
3. On the **User Access** menu, click **Delete Access User**. Alternatively, click **Delete User** on the toolbar
4. In the confirmation dialog box that appears, click **Yes**.

Access Groups

Access Management Groups are useful if there are multiple users supporting multiple Groups. They enable you to add all Access Users to a particular Access Group and then assign the applicable Role to the Access Group, rather than assigning the same Role to multiple users.

You can use the SP Console to manage Access Groups as follows:

- **Add Access Groups**
- **Assign Access Users to Access Groups**
- **Delete Access Groups**

To add an Access Group:

1. In the User Access Management tree, click **Access Groups**.
2. On the **Access Groups** menu, click **New Access Group**. Alternatively, click the **New Group** button on the main toolbar or right click **Access Groups**, and then click **New Access Group** on the shortcut menu that appears.
3. In the **New Access Group** dialog box that appears, type an Access Group name in the **Group name** box.
4. At this point, you can click the **Create** button to create the Access Group without assigning any members yet. Alternatively, you can click the **Add** button, select users to add to the Group, click **OK** to close the **Select Users** dialog box, and then click **Create** to create the Access Group.

To assign Access Users to an Access Group:

1. Ensure that **Access Groups** is selected in the User Access Management tree.
2. On the **Access Groups** menu, click **Configure**. Alternatively, double-click the Access Group name in the work area or click the Access Group name and then click the **Configure** button or right-click the Access Group name, and then click **Configure** on the shortcut menu that appears.
3. In the properties dialog box that appears, click the **Add** button.
4. In the **Select Users** dialog box that appears, select the users you wish to add to the Group.
5. Click **OK** to close the **Select Users** dialog box.
6. Click **OK** to close the properties dialog box and save your changes.

The selected Access Users are now added to the Access Group.

To delete an Access Group:

1. Ensure that **Access Groups** is selected in the User Access Management tree.
2. Click the Access Group name in the work area.
3. On the **Access Groups** menu, click **Delete Access Groups**. Alternatively, click the **Delete Group** button on the toolbar or right-click the Access Group name and then click **Delete Access Group** on the shortcut menu that appears.
4. In the confirmation dialog box that appears, click **Yes**.

Roles

Two predefined Roles are included in the Storage Platform Console: Group Admin and View Only.

Group Admin

Group Admin enables the Access User to administer the Backup Group it has been allocated to with general Group permissions enabled. The Group Admin role also provides access to the Activity area and Enterprise Reports (if installed).

*Note: Remote Management is enabled by default in the Group Admin role. To disable the feature, remove the **SE_Rights** from the role. If you connect using the standard Remote username and password, the **SE_Rights** are ignored – you must use your Admin Account in order to limit Remote Management rights.*

View Only

Access Users with the View Only role can access the Account Management view, which enables them to view all Backup Accounts in the Backup Group, but they cannot modify any settings.

You can manage Roles as follows:

- **Create new roles**
- **Modify/Configure roles**
- **View rights allocated to a role**
- **Copy roles to use as templates**
- **Delete roles**

To create a new role:

1. In the User Access Management tree, click **Roles**.
2. On the **Roles** menu, click **New Role**. Alternatively, click the **New Role** button on the main toolbar or right-click the **Roles** node, and then click **New Role** on the shortcut menu that appears.
3. In the **New Role** dialog box that appears, type a name for the role in the **Name** box.
4. Type a description of the role in the **Description** box.
5. In the Rights area, select the check boxes next to the rights you wish to grant assigned Access Users.
6. Click the **Navigation Panes** tab and select the views you wish to grant assigned Access Users.

Note: All allowed panes are filtered to only display the Backup Groups/Accounts that the Access Users are allowed to see.

Tips:

- *You can use the **Select All** button to grant Access Users all rights.*
- *You can use the **Select None** button to clear all selections, enabling you to start the selection process anew.*
- *You can click the **Show Advanced Rights** button to display additional rights only required for use by advanced users. These entries (marked in red) are not used by the Storage Platform Console but are available for XML calls to the Storage Platform.*

7. Click **OK**.

The new role will be added to the Roles list in the work area. You can configure, copy or delete it at any time, using the methods described below.

To modify/configure a role:

1. Click the role name in the Roles list.
2. On the **Roles** menu, click **Configure**. Alternatively, click the **Configure** button on the toolbar or right-click the role name and then click **Configure** on the shortcut menu that appears.
3. In the properties dialog box that appears, modify/configure the role as desired.
4. Click **OK**.

To view rights allocated to a role:

1. Click the role name in the Roles list.
2. On the **Roles** menu, click **Configure**. Alternatively, click the **Configure** button on the toolbar or right-click the role name and then click **Configure** on the shortcut menu that appears. In the Rights area of the properties dialog box that appears, all rights allocated to the role are displayed as selected.
3. Click the **Navigation Pane** tab to view the display rights allocated to the role.

To copy a role for use as a template for additional roles:

1. Click the role name in the Roles list.
2. On the **Roles** menu, click **Copy Role**. Alternatively, right-click the role name in the work area and then click **Copy Role** on the shortcut menu.
3. In the **Copy Role** dialog box that appears, type a unique name for the role in the box provided.
4. Click **OK**.

A copy of the original role will be saved with the new name and listed in the Roles list.

To delete a role:

1. Click the role name in the Roles list.
2. On the **Roles** menu, click **Delete Role**. Alternatively, right-click the role name in the work area and then click **Delete Role** on the shortcut menu.
3. In the confirmation dialog box that appears, click **Yes**.

To assign roles to Access Users or Access Groups:

Roles are assigned to Access Users/Groups by configuring the appropriate Backup Group's Permissions tab. See *Permissions tab* in Chapter 6, "Account Management".